Oracle® Services Procurement

Process Guide

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Preface

Intended Audience

Welcome to Release 12.2 of the *Oracle Services Procurement Process Guide.*

Implementers, administrators, and users:

See Related Information Sources on page x for more Oracle E-Business Suite product information.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trsif you are hearing impaired.

Structure

Related Information Sources

Oracle Purchasing User's Guide

Oracle iProcurement User Guide

Oracle iProcurement Implementation and Administration Guide

Oracle Sourcing User Guide

Oracle Sourcing Implementation and Administration Guide

Oracle iSupplier Portal User's Guide

Oracle iSupplier Portal Implementation Guide

Oracle Projects Implementation Guide

Oracle Projects Fundamentals

Oracle HRMS Configuring, Reporting, and System Administration Guide

Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide

Oracle Time and Labor Implementation and User's Guide

Oracle Payables Implementation Guide

Oracle Payables User's Guide

Oracle Procurement Contracts Implementation and Administration Guide

Oracle Supplier Management Implementation and Administration Guide

Oracle Supplier Management User's Guide

Integration Repository

The Oracle Integration Repository is a compilation of information about the service endpoints exposed by the Oracle E-Business Suite of applications. It provides a complete catalog of Oracle E-Business Suite's business service interfaces. The tool lets users easily discover and deploy the appropriate business service interface for integration with any system, application, or business partner.

The Oracle Integration Repository is shipped as part of the Oracle E-Business Suite. As your instance is patched, the repository is automatically updated with content appropriate for the precise revisions of interfaces in your environment.

Do Not Use Database Tools to Modify Oracle E-Business Suite Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle E-Business Suite data unless otherwise instructed.

Oracle provides powerful tools you can use to create, store, change, retrieve, and

maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle E-Business Suite data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle E-Business Suite tables are interrelated, any change you make using an Oracle E-Business Suite form can update many tables at once. But when you modify Oracle E-Business Suite data using anything other than Oracle E-Business Suite, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle E-Business Suite.

When you use Oracle E-Business Suite to modify your data, Oracle E-Business Suite automatically checks that your changes are valid. Oracle E-Business Suite also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

1

Overview of Oracle Services Procurement

This chapter covers the following topics:

- Overview of Oracle Services Procurement
- Using Oracle Services Procurement

Overview of Oracle Services Procurement

Oracle Services Procurement is the application that enables complete control and oversight for services spending. It is a key component of Oracle Advanced Procurement suite. Oracle Services Procurement automates and streamlines the process of requisitioning, sourcing, procuring, and handling payments for services such as repair and maintenance, hiring contingent workers, managing professional services, and facilities management. End-to-end services procurement processes are automated; these processes integrate with Oracle E-Business Suite applications to provide complete and comprehensive procure to pay cycles.

With Oracle Services Procurement, you can:

- Bring Purchasing oversight to services. Oracle Services Procurement helps you source and manage services.

- Define and manage all aspects of your services business arrangement utilizing contracts. The ability to define, manage, control, and track these contract elements keeps lead times and costs in check while preventing cost overruns.

  - For complex services such as construction or professional services, you can define payment terms, progress payment schedule, financing advances, financing advances recoupment and retainage rates for services settlement.

  - For contingent labor, you can define appropriate rates, terms, job information and more.

- Use preferred suppliers right from the initial request, funneling orders to preferred

suppliers so that services are sourced to the correct supplier at negotiated rates every time. Oracle Sourcing can be used to negotiate terms with potential vendors. For services that are routinely requisitioned by employees, create an approved vendor list that may contain one or multiple approved suppliers. For a unique request, you may choose to allow the employee to suggest a new supplier.

- Track all aspects of the order and invoice directly as suppliers. Online tracking and change management frees procurement professionals from the burden of routine inquiries and change requests.

- Match to the original terms of payment, purchase order, and/or services receipts.
  - For complex services, to calculate the payment due to the supplier, use an invoice that is received or Work Confirmation created for the progress payment specified on the contract. Previous financing payments, if any, are recouped, and applicable retainage are withheld before payment is made.

  - For contingent workers, use approved, supplier-entered timecards, as a services receipt or to auto-generate a supplier invoice based on approved timecards.

- Ensure services delivery and compliance with deliverable tracking. For more complex contract needs, use Oracle Services Procurement in conjunction with Oracle Procurement Contracts to track deliverables online, ensuring that contract terms and conditions are fulfilled.

- Set policies for services spending approval. Oracle Services Procurement ensures that adequate spending checks are in place. Approval rules are configurable, typically requiring approval from the employee's management and possibly other groups as appropriate. Services requests are placed against open projects and their budgets. Oracle Services Procurement provides the necessary checks. Once the request is authorized, employees track the spending amount against submitted invoices to see remaining budget.
  - For complex services, suppliers can report progress either in the form of a Work Confirmation or an Invoice. The system automatically updates the purchase order based work confirmations and invoices, providing advance warning before spending runs over budget.

  - When integrated with Oracle Time and Labor, contingent workers fill out timecards online to indicate work performed.

- Track the entire services cycle with online access to the detailed history of each order. Employees view the status of service requests and drill to supporting details such as the approval status, purchase orders, timecards and invoices. Project managers initiate changes to service requests, which generate automatic notifications to suppliers. With advance notice of changes, suppliers provide more responsive service and your buying organization incurs fewer penalties or cost

premiums for expedited service.

- Measure supplier and contingent labor performance. With Oracle Services Procurement, delivery of services is tracked to completion. Suppliers monitor their on-time performance for individual service requests through the portal, ensuring proper feedback to the supplier. For contingent labor, hiring managers enter in contractor performance data at the end of each assignment. This information is shared throughout the enterprise. So other hiring managers can view prior performance information to select the best contractors for each job.

Typical Users of Oracle Services Procurement

Oracle Project Procurement empowers organizations to effectively manage the procurement of complex work and contingent workers.

The following industries can benefit the most from the product's capabilities:

- Procurement of Complex Work: Industries such as Engineering and Construction (E&C), Aerospace and Defense (A&D), Engineer to Order (ETO), and Maintenance Repair and Overhaul (MRO).

- Procurement of Contingent Workers: Industries such as professional services, facilities management, marketing, and telecom.

How Oracle Services Procurement Addresses Industry Requirements

Oracle Services Procurement addresses the following business requirements across industries:

- Administers corporate polices:
  - Negotiate master agreements successfully with terms, conditions and rates
  - Source and drive spend towards preferred / performing suppliers
  - Ensure that contract terms and rates are enforced
- Shares knowledge and gain visibility towards services spend:
  - Visibility to predefined terms, rate and suppliers
  - Capture spend in the system
  - Analyze spend using business intelligence tools
- Eliminates over-billing errors and improves supplier performance
- Checks and controls time and labor entries

- Service receipt to auto-generate invoice
- Analyze supplier performance using business intelligence tools
- Reduces procurement cycles timeframes and improves service levels through suppliers collaboration
  - Online sourcing collaboration
  - Generate agreement directly from award
  - Supplier viewing of PO, timecard, invoice
  - Change order management

For information on how Oracle Services Procurement helps enterprises to handle the following business flows, see: Using Oracle Services Procurement, page 1-4:

- Procurement of complex services that involves payments based on progress of work.
- Procurement of contingent workers and making payments based on time reported.

Using Oracle Services Procurement

Enterprises spend a significant portion of their corporate budget on the acquisition or procurement of services. Acquiring services include purchase of complex goods and services such as construction subcontract for electrical work, concrete work and piping, professional services, facilities management and Maintenance Repair and Overhaul (MRO).

Several buying organizations have fragmented, paper-driven, and manual processes for managing services that result in:

- Lack of visibility and lack of control over services spend
- Inability to initiate and sustain end-user compliance
- Overbilling and inability to track supplier performance
- Increased cycle time

Oracle Services Procurement integrates the entire services procurement lifecycle and supports a broad range of service categories including contingent labor, facilities management, subcontracted labor, professional services and more. It provides visibility into service spend and the performance of suppliers. Oracle Services Procurement enables managers to have complete control and perspective in the service spend arena.

Processing the Procurement of Complex Work and Contingent Workers

Oracle Services Procurement helps you manage the following requirements of business organizations:

- Procurement of complex services that involves payments based on progress of work.
- Procurement of contingent workers and making payments based on time reported.

Processing the Procurement of Complex Work

Procurement of services accounts for 40% to 80% of a project or enterprise activity. Since 'Procurement' is a major part of company's operations, enterprises focus on improving the efficiency of their procurement processes.

Procurement plays a major role in industries such as Engineering and Construction (E&C), Aerospace and Defense (A&D), Engineer to Order (ETO) and Utilities. The procurement process for these industries is broadly classified into five different categories:

- Procurement of bulk commodities
- Procurement of engineered equipment
- Procurement of catalog items
- Procurement of subcontracting services
- Rentals

This process involves collaboration between project managers, buyers, and suppliers. Complex service procurement involves authoring of complex contractual terms and conditions with complex payment controls.

For the E&C Industry:

- Bulk commodities are construction material such as Rebar, lumber, and piping etc. The materials undergo a 'material take off' process where lengths, weights, and other metrics are derived from Computer Aided Design (CAD) drawings. These units are then aggregated into the most economic buying quantities and measures before they are recorded on a purchase order document.
- Engineered equipments are complex machines such as boilers that are represented in the system as one line item for commercial purposes and multiple line items for receiving and installation.
- Catalog items are defined set of items that are procured on a frequent basis. Some

categories of items like 'First Aid Kits and Kit Refills' are examples of catalog items.

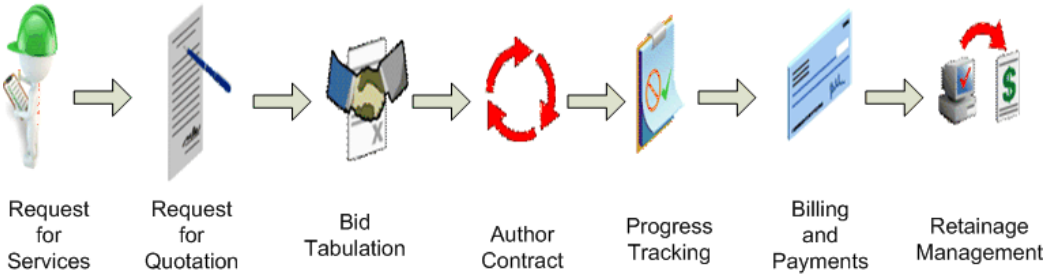
- Subcontracting services include complex outsourcing on a scope of work. For example, if you operate a power plant, you may outsource the corrosion protection service to a subcontractor.

- Lastly, Utilities and E&C firms use a lot of rental equipment. The Rental category is for renting heavy equipment such as tower cranes, bulldozers, etc.

Typical Business Flow of the Procurement of Complex Work

The following diagram shows a typical business flow for the procurement of complex work at a high level:

High Level Business Flow of Procurement of Complex Work



The procurement of complex work as shown in the business flow diagram involves the following phases:

- Request for Services: Request for services usually originates from different sources. Examples are project manager or the procurement manager involved in a construction project, field engineers and architects. These users request a service when there is a requirement.

- Request for Quotation: If the required service involves higher value, longer lead time, and a complex payment term, the buying organization creates a Request for Quotation (RFQ) to negotiate the contract terms. The RFQ is usually associated with a specific project. If the buying organization needs to evaluate the technical expertise of suppliers, then the technical evaluation takes place in the RFQ process. Negotiations with the supplier on commercial terms include negotiating on the complex payment terms, progress payments schedule, retention clauses and deliverables.

- Bid Tabulation: The buying organization analyzes and compares the bids provided by the suppliers using comparative analysis. Suppliers are evaluated and then shortlisted based on the offers made on the commercial terms and the technical expertise they provide.

- Author Contract: The buying organization and supplier organization agree to the

progress payments schedules and contract terms and conditions. The parties sign the contract which is then available for execution.

- Track Progress: The supplier performs the service and the progress of the work is tracked periodically. Payments are made to the supplier based on the progress of the work. The project manager in charge of the work approves the progress of the work so that payments are made to the supplier. The project manager views projected and actual tasks, milestones, and dates. This helps to track commitments, reported work, completed jobs, work in progress, remaining assignments or operations.

- Billing and Payments: When invoices are generated by the supplier for the progression in work, the complex payment terms specified in the contract document are made available in the invoices in order to calculate the actual payments to be made to the supplier. The advance paid to the supplier is recouped based on the recoupment percentage specified in the contract document. If the contract document contains retainage information, the retainage percentage is applied on the invoice value, prior to making payments to the supplier.

- Retainage Management: Retainage management is the process of releasing or paying the portion of a payment that was withheld until a substantial portion or all of the service procurement work is completed. The amounts retained during the life of the contract must be released and paid to the supplier or subcontractor when all, or a substantial portion of the work is completed. When the release criteria are met, suppliers request a release of the retained amount by submitting a document called a Retainage Release Request.

How the Oracle Services Procurement Solution Helps to Process the Procurement of Complex Work

Multiple products in Oracle e-Business Suite are integrated to form the Complex Work solution. The products: Oracle Projects, Oracle Payables and Oracle Advanced Procurement (that includes Oracle Purchasing, Oracle iProcurement, Oracle Sourcing, Oracle iSupplier Portal, Oracle Supplier Life Cycle Management and Oracle Procurement Contracts) are integrated to provide a complete solution for the procurement of complex work.

- Create service requests from the deliverables of the individual tasks in Oracle iProcurement. Negotiate, source, and award requests to a contractor through Oracle Sourcing.

- Specify complex payment terms, execute the contract, report and track progress against the progress payment schedule through Oracle Purchasing and Oracle iSupplier Portal.

- Record invoices using the complex payment terms and process payments for the contract in Oracle Payables.

- Use Oracle Projects to manage the entire undertaking, the tasks involved, as well as to monitor commitments and actuals throughout the complex services procurement cycle along with project costs and work progress.

For complete information on processing the procurement of complex work, refer to the chapter, *Processing Complex Work*.

Processing the Procurement of Contingent Workers

The procurement of contingent workers happens in almost all industries, specifically in sectors such as facilities, financial, marketing, and telecom.

Typical Business Flow of the Procurement of Contingent Workers

The following diagram shows a typical business flow of the procurement of contingent workers at a high level:

High Level Business Flow of Procurement of Contingent Worker

The procurement of contingent workers as shown in the business flow diagram involves the following phases:

- Procure contingent workers
- Assign contingent workers to projects and tasks
- Monitor the work performed by contingent workers
- Process contingent worker timecards and expense reports
- Track and report contingent worker costs

How the Oracle Services Procurement Solution Helps to Process the Procurement of Contingent Workers

Oracle Services Procurement enables enterprises to automate and streamline the process for sourcing, procuring and managing the payment of contingent workers.

Multiple products in Oracle e-Business Suite are integrated to form the Contingent Worker Procurement solution. The products: Oracle Human Resources, Oracle Projects, Oracle Time and Labor. Oracle Internet Expenses and Oracle Advanced Procurement

(that includes Oracle Purchasing, Oracle iProcurement, and Oracle iSupplier Portal) are integrated to provide a complete solution for the procurement of contingent workers.

The integrated platform provides the flexibility to capture job and skill requirements, assignment information, and optionally a statement of work.

The integrated solution to process the procurement of contingent workers enables you to:

- Create purchase orders for procuring rate based services using Oracle iProcurement, Oracle Sourcing and Oracle Purchasing.
- Use Oracle Sourcing as buyers to negotiate on the rate to be paid for contractors.
- Manage contingent workers differently from other workforce types using Oracle Human Resources Management System (Oracle HRMS). Buyers enter and maintain information about the contingent workers and reference purchase orders created in Oracle Purchasing to track supplier and rate information for a worker's assignment. Oracle HRMS provides the infrastructure to monitor and track the assignment history of contingent workers including breaks in assignment.
- Record contingent worker time entries in Oracle Time and Labor. Timecard entries are validated against the purchase order to ensure the timecard does not exceed pre-authorized amounts. When timecards are approved, the purchase order is updated, depleting the budget of the approved time. Buying organizations use this information to generate payment to the supplied based on the record time.
- Use Oracle iSupplier Portal to view and download approved timecards. Invoice errors and over billing are minimized by automatically creating invoices from service receipts.
- Use Oracle Time and Labor, Oracle Purchasing, and Oracle Projects integration to track the time spent on the service purchaser order, which is charged on the corresponding project activity. Other details captured for the task are the task and expenditure for a project. Buyers retrieve timecard data to projects.
- Use Oracle Time and Labor and Oracle Purchasing integration to allow the invoices to be automatically generated from the approved timecard thereby eliminating invoice errors. Create expense reports for contingent workers in Oracle iExpenses.

For complete information on processing the procurement of contingent workers, refer to the chapter, *Processing the Procurement of Contingent Workers*.

2

Implementing Oracle Services Procurement

This chapter covers the following topics:

- Licenses for Oracle Services Procurement
- Profile Options Used in Oracle Services Procurement
- Concurrent Programs Used in Oracle Services Procurement Business Flows
- Implementation Considerations in Oracle Services Procurement
- Overview of Implementing Oracle Services Procurement
- Overview of Setting Up Steps to Process the Procurement of Complex Work
- Setting Up Steps in Oracle Purchasing to Process the Procurement of Complex Work
- Setting Up Steps in Oracle Approvals Management to Process the Procurement of Complex Work
- Setting Up Steps in Oracle E-Business Tax to Process the Procurement of Complex Work
- Setting Up Steps in Oracle Procurement Contracts to Process the Procurement of Complex Work
- Overview of Setting Up Steps to Process the Procurement of Contingent Workers
- Setting Up Steps in Oracle iProcurement to Process the Procurement of Contingent Workers
- Setting Up Steps in Oracle Purchasing to Process the Procurement of Contingent Workers
- Setting Up Steps in Oracle Human Resources to Process the Procurement of Contingent Workers
- Setting Up Steps in Oracle Time and Labor to Process the Procurement of Contingent Workers
- Setting Up Steps in Oracle Internet Expenses to Process the Procurement of

Contingent Workers

- Setting Up Steps in Oracle Projects to Process the Procurement of Contingent Workers

Licenses for Oracle Services Procurement

Prerequisite Licenses

To use Oracle Services Procurement, you must license and implement Oracle Purchasing.

Oracle Service Procurement Integration with Other Oracle E-Business Suite of Products

Oracle Services Procurement integrates and interacts with the other Oracle E-Business Suite products.

The following tables provide information on the features that you can use in the other Oracle Applications, if you have licensed and implemented these products:

Processing the Procurement of Complex Work

Feature	Application Required
Requisitions for Services	Oracle iProcurement
Vendor Questionnaires, Request for Quotation (RFQ), RFQ Analysis, Awards, Compare Quotes	Oracle Sourcing
Complex Work Contracts	Oracle Procurement Contracts
Quotes, Work Confirmations	Oracle iSupplier Portal
Procurement Services Invoice, Pay on Receipt, Retainage Release	Oracle Accounts Payable
Track Project Progress, Deliverables, Projections and Actuals, Deduction and Back Charge Processing, Change Management, Change Requests, Change Order, Reporting Analytics	Oracle Projects

Feature	Application Required
Tax Structure (Tax Regimes, Tax, Tax Status, Tax Jurisdictions, Tax Recovery rates, Tax rates, Tax Rules)	Oracle E-Business Tax

Processing the Procurement of Contingent Workers

Feature	Application Required
Contingent Worker Requisitions	Oracle iProcurement
Contingent Worker HR Details	Oracle Human Resources or Oracle Self-Service
Contingent Worker Timecard and Labor Data	Oracle Time and Labor
Process for Sourcing, Procuring And Managing Contingent Worker Including Viewing Details of Timecard	Oracle iSupplier Portal
Import Contingent Worker Timecards with Purchase Order Integration	Oracle Projects
Contingent Workers as Scheduled Resource Allowing Search And Assign Resource to Active Projects	Project Resource Management
Contingent Worker Invoice	Oracle Accounts Payable
Contingent Worker Expense Reports	Oracle iExpenses

Profile Options Used in Oracle Services Procurement

A number of profile options govern the behavior of Oracle Services Procurement. During implementation, set a value for each profile option to specify how Oracle Services Procurement controls access to and processes data.

Profile options are grouped into the following categories:

- Prerequisite Profile Option
- Profile Options to Process the Procurement of Complex Work
- Profile Options to Process the Procurement of Contingent Workers

The following tables list the profile options with a reference to their Oracle Application, a brief description, and the business flow.

Prerequisite Profile Option

Profile Option	Oracle Application	Description
PO: Enable Services Procurement	Oracle Purchasing	The value Yes indicates that Oracle Services Procurement is licensed and installed. Setting this profile value to Yes will enable service line types in Oracle Sourcing and Oracle Purchasing. When the profile option is enabled, buyers can create lines with the following additional line types: • Fixed Price Services • Fixed Price Temp Labor • Rate based Temp Labor

Profile Options to Process the Procurement of Complex Work

Oracle Services Procurement uses the following profile option in the procurement of complex work business flow.

Profile Option	Oracle Application	Description
POR : Amount Based Services Line Type	Oracle iProcurement	Determines the line type for amount-based non-catalog requests. An amount-based request is expressed in monetary terms - for example, 500 USD worth of service. The value selected should be distinct from the values selected for POR: Goods Line Type and POR: Rate Based Services Line Type. You can select only line types with a Purchase Basis of Services and a Value Basis of Amount for this profile option. If Oracle Services Procurement is licensed and implemented, then you can select a Value Basis of Fixed Price or Amount. For more information, refer to the *Oracle iProcurement Implementation and Administration Guide*.

Profile Option	Oracle Application	Description
POR: Default Currency Conversion Rate Type	Oracle iProcurement	Specifies the default exchange rate type. This rate applies when: • Creating non-catalog requests. • Converting an uploaded item's transactional price into a requester's functional price. • Converting a punchout or transparent punchout item's transactional price into the functional price. Exchange rates cannot be found during contractor assignment. If you are converting prices of punchout or transparent punchout items, you must set this profile option to either Corporate or Spot (not User). Otherwise, the requester receives an error message during checkout that no exchange rate exists and cannot check out the item. For more information, refer to the *Oracle iProcurement Implementation and Administration Guide.*

Profile Options to Process the Procurement of Contingent Workers

Profile Option	Oracle Application	Description
PO: UOM class for Temp Labor Services	Oracle Purchasing	Controls the rate based temp labor line type. For a rate based temp labor line type, entry of unit of measure (UOM) is restricted to those in this UOM class. For more information, refer to the *Oracle Purchasing User's Guide*.
POR: Rate Based Services Line Type	Oracle iProcurement	Specifies the line type for rate-based non-catalog requests. A rate-based request is expressed as a monetary charge for each time period. The value selected must be distinct from the values selected for POR: Goods Line Type and POR: Amount Based Services Line Type. Select only line types with a Purchase Basis of Goods and a Value Basis of Quantity for this profile option. In Oracle iProcurement, requisition creation, the Services billed by quantity item type corresponds to the line type selected in the POR: Rate Based Services Line Type profile option. For more information, refer to the *Oracle iProcurement Implementation and Administration Guide*.
PO: Contractor Assignment Completion Warning Delay	Oracle Purchasing	Yes indicates that the contractor assignment completion notification is sent to the requester when the assignment is complete. For more information, refer to the *Oracle Purchasing User's Guide*.

Profile Option	Oracle Application	Description
PO: Amount Billed Threshold Percentage	Oracle Purchasing	Indicates the amount above which the amount billed exceeded threshold notification will be sent to the requester. For more information, refer to the *Oracle Purchasing User's Guide*.
POR: Contractor Expense Line Type	Oracle iProcurement	Indicates the line type that should be used for expense lines on contractor requests. For more information, refer to the *Oracle iProcurement Implementation and Administration Guide*.

Profile Option	Oracle Application	Description
POR: Reapproval after Contractor Assignment	Oracle iProcurement	Determines whether reapproval of the requisition is required after contractor assignment. Select Always to always require approval. Conditionally Required means that reapproval is required only if a change has been made that triggers reapproval – for example, at least one line amount has changed, or the requester modified the unit price, quantity, unit of measure, account, distribution, or project information on the requisition during the checkout that follows contractor assignment. If the new line amount is below the requester's approval limit, then only the requester's reapproval (no additional approval) is required. For more information, refer to the *Oracle iProcurement Implementation and Administration Guide*.
ICX: Days Needed By	Oracle iSupplier Portal	The Start Date on the contractor request defaults based on this profile option, which is also part of the requester's iProcurement preferences.

Profile Option	Oracle Application	Description
HR: Expand Role of Contingent Worker	Oracle Human Resources	Determines whether you can select contingent workers to perform many of the roles fulfilled by employees. For example, if you set this option to Yes, you can select a contingent worker to be a supervisor in the Assignment window and an authorizer in the Absence window. For more information, refer to the *Oracle HRMS Configuring, Reporting, and System Administration Guide*.
HR: CWK in Head Count Reports	Oracle Human Resources	Determines whether contingent workers are included in head-count reports. For more information, refer to the *Oracle HRMS Configuring, Reporting, and System Administration Guide*.
HR: Use Global Contingent Worker Numbering	Oracle Human Resources	Enables the global sequence for contingent-worker-number generation. This sequence is shared among all business groups. To set this profile option, you run the process "Change automatic person number generation to global sequencing". You cannot set this option in the System Profile Values window. For more information, refer to the *Oracle HRMS Configuring, Reporting, and System Administration Guide*.

Profile Option	Oracle Application	Description
HR: Contingent Worker Manager Actions Menu	Oracle Human Resources	Controls which Manager Actions menu SSHR displays for managers who are also contingent workers. If you create a custom Manager Actions menu for contingent workers, you must change this profile option to point to your custom menu. For more information, refer to the *Oracle HRMS Configuring, Reporting, and System Administration Guide*.
HR: Contingent Worker Personal Actions Menu	Oracle Human Resources	Controls which Personal Actions menu SSHR displays for users who are also contingent workers. If you create a custom Personal Actions menu for contingent workers, you must change this profile option to point to your custom menu. For more information, refer to the *Oracle SSHR Deploy Self-Service Capability Guide*.
MO: Operating Unit	Common Applications	Operating Unit value comes from this profile option and controls contingent workers' access to purchase orders.
HR: Business Group	Oracle Human Resources	Determines the business group linked to a responsibility. For more information, refer to the *Oracle HRMS Configuring, Reporting, and System Administration Guide*.

Profile Option	Oracle Application	Description
HR: Security Profile	Oracle Human Resources	Restricts access to the organization, positions and payrolls defined in the security profile. For more information, refer to the *Oracle HRMS Configuring, Reporting, and System Administration Guide*.
PA: Allow Time Entry of Negative Hours	Oracle Projects	Indicates whether you can enter negative hours on timecards in Oracle Time & Labor. For more information, refer to the *Oracle Projects Implementation Guide*.
PA: AutoApprove Timesheets	Oracle Projects	Indicates whether to automatically approve timecards submitted in Oracle Time and Labor. For more information, refer to the *Oracle Projects Implementation Guide*.
PA: Enable Business Messages on Time Entry	Oracle Projects	Indicates whether Oracle Time and Labor displays a business message. For more information, refer to the *Oracle Projects Implementation Guide*.
PA: Override Approver	Oracle Projects	Indicates whether you can enter an overriding approver for timecards in Oracle Time and Labor. For more information, refer to the *Oracle Projects Implementation Guide*.

Concurrent Programs Used in Oracle Services Procurement Business Flows

This topic provides information on the concurrent programs that you run when processing the following business flows in Oracle Services Procurement:

- Processing the procurement of complex work
- Processing the procurement of contingent workers

The following table lists the concurrent programs with a brief description and a reference to their Oracle Application.

Concurrent Program	Oracle Application	Description	Business Flow
PRC: Interface Supplier Costs	Oracle Projects	Supports the implementation option 'Import contingent workers time cards with PO integration'. Retrieves project-related supplier costs and interfaces them from Oracle Purchasing and Oracle Payables to Oracle Projects. For more information, refer to the *Oracle Projects Fundamentals Guide*.	Contingent Worker Procurement

Concurrent Program	Oracle Application	Description	Business Flow
PRC: Distribute Labor Costs	Oracle Projects	Supports the contingent labor integration with purchase orders, If integration is set up with Oracle Purchasing, then the labor-costing program derives the rate from the purchase order line. For contingent worker timecards with Oracle Purchasing integration, when you run the process PRC: Distribute Labor Costs, Oracle Projects uses rates from the related purchase order to calculate the costs. For more information, refer to *Oracle Projects Fundamentals* and *Oracle Project Costing User Guide*.	Contingent Worker Procurement
PRC: Distribute Total Burdened Costs	Oracle Projects	Creates the total burdened cost distribution lines for all transactions charged to burdened projects, even if the transaction is not burdened, to account for the total project costs in the cost WIP account. For more information, refer to the *Oracle Project Costing User Guide*.	Complex Work Procurement

Concurrent Program	Oracle Application	Description	Business Flow
PRC: Submit Interface Streamline Processes	Oracle Projects	Streamline processes submit and monitor a series of processes that must be run sequentially to complete a function. Refer to the topic Submitting Streamline Processes, *Oracle Projects Fundamentals*.	Complex Work Procurement Contingent Worker Procurement
PRC: Interface Expense Reports to Payables	Oracle Projects	Submits the Oracle Projects Interface Expense Reports to Payables process to transfer expense reports to the Payables Expense Report Interface tables. For more information refer to *Oracle Projects Fundamentals*.	Complex Work Procurement
PRC: Transaction Import	Oracle Projects	Uses predefined transaction sources to import transactions from other Oracle Applications such as Oracle Inventory, Oracle Project Manufacturing, Oracle Time and Labor, and Oracle Labor Distribution. For more information, refer to the *Oracle Projects Implementation Guide*.	Contingent Worker Procurement

Concurrent Program	Oracle Application	Description	Business Flow
PRC: Update Project Summary Amounts for a Single Project	Oracle Projects	Updates the project summary amounts with new cost, commitment, and revenue transactions and any new baselined budget versions. You can run this process as many times as you want. To submit the process for one project, submit the PRC: Update Project Summary Amounts for a Single Project process. For more information, see: *Oracle Projects Fundamentals.*	Complex Work Procurement
Retrieve Time from OTL	Oracle Purchasing	If Oracle Services Procurement is implemented and contract workers enter their time through Oracle Time and Labor, then use this process to generate receipts for the recorded time. You can complete the procure-to-pay flow by running the Pay on Receipt process. This process loads the time transactions into the Receiving Open Interface and then the Receiving Transaction Processor is automatically launched to import the receipts.	Contingent Worker Procurement

Implementation Considerations in Oracle Services Procurement

The following topic provides information on implantation considerations for the complex work and contingent worker business flow.

Implementation Considerations for the Complex Work Business Flow Available Line Types

The following table provides information on the different pay items available for various line types in a complex purchase order.

Line Type	Value Basis	Purchase Basis	Matching Basis	OSP Item	Pay Items Available
Goods	Quantity	Goods	Quantity	No	Milestone
Goods	Quantity	Goods	Quantity	Yes	Not available in Complex Orders
Amount	Amount	Services	Quantity	NA	Not available in Complex Orders
Fixed Price Services	Fixed Price	Services	Amount	NA	Milestone, Lump Sum and Rate
Fixed Price Temp Labor	Fixed Price	Temp Labor	Amount	NA	Milestone, Lump Sum and Rate
Rate based Temp Labor	Rate	Temp Labor	Amount	NA	Milestone, Lump Sum and Rate

Destination Types

The destination type is identified based on the selected document style.

The destination type for:

- Fixed price service line types can be Expense only.
- Goods line types can be Inventory and Expense.

Non-Financed Purchase Orders

For a non-financed Purchase Order document:

- The pay items need to add up to the total value of the line.
- The recoupment rate should be high enough to liquidate the advances paid.

Financed Purchase Orders

In a financed purchase order document:

- The line has its own delivery shipment.
- All the pay items are taken to be financed and billed using 'Prepayment' invoice only.
- The sum total of pay items and advances specified should be less than or equal to the total amount of the line.
- Recoupment rate should be high enough to liquidate the advances and the pay item amount.
- Accrue at Receipt is not supported for financed pay items.
- Encumbrance is not supported for financed purchase orders.

Implementation Considerations for the Contingent Worker Business Flow

Encumbrance

In Oracle Purchasing, you have the choice of encumbering a blanket purchase agreement or the requisition. For Pending contractor requests, the encumbrance is always done on the requisition. During contractor assignment, Oracle iProcurement temporarily unreserves (releases reserved) funds. The funds are re-reserved after contractor assignment is completed.

Jobs

Oracle Human Resources jobs are specific to a business group. Therefore, the job selected on the contractor request limits the deliver-to location on the requisition to those locations that belong to the preparer's business group.

Document Sourcing

If you have set up global blanket agreement or contract purchase agreement document sourcing, then Oracle iProcurement displays the source document information in the preferred supplier list on the contractor request if the following conditions are met. (Some of these conditions apply only to blanket, not contract, agreements.)

The source document's supplier and supplier site match a supplier and supplier site in the ASL for the selected job category. The start date entered on the contractor request

must fall within the effective dates of the source document.

Price break information from the source document is used, based on the deliver-to location selected on the contractor request and the date the request was created. That is, if the date that the request was created is within the effective dates on the price break, then that price break is used. The line type on the source document must match the line type on the contractor request. For example, if a Type of Fixed Price Temporary Labor is selected on the contractor request, then only source document lines with this line type appear.

Note: Oracle iProcurement does not obtain new source document information if the requester changes the start date during contractor assignment or changes the requisition later using the Change button. If the currency on the global blanket agreement differs from the requester's functional currency, then Oracle iProcurement uses the exchange rate in the system to perform a currency conversion. If an exchange rate cannot be found, then Oracle iProcurement uses the exchange rate the POR: Default Currency Conversion Rate Type profile option determined.

Descriptive Flexfields

For contractor requests, descriptive flexfields do not appear in the shopping cart, even if you use Oracle Applications Framework personalization to display them.

Overview of Implementing Oracle Services Procurement

To implement Oracle Services Procurement, set the PO: Enable Services Procurement profile option to Yes.

Analyze your business requirements and complete the following steps to use Oracle Services Procurement.

- Setting Up Steps to Process the Procurement of Complex Work. See: Overview of Setting Up Steps to Process the Procurement of Complex Work, page 2-19
- Setting Up Steps to Process the Procurement of Contingent Workers. See: Overview of Setting Up Steps to Process the Procurement of Contingent Workers, page 2-42

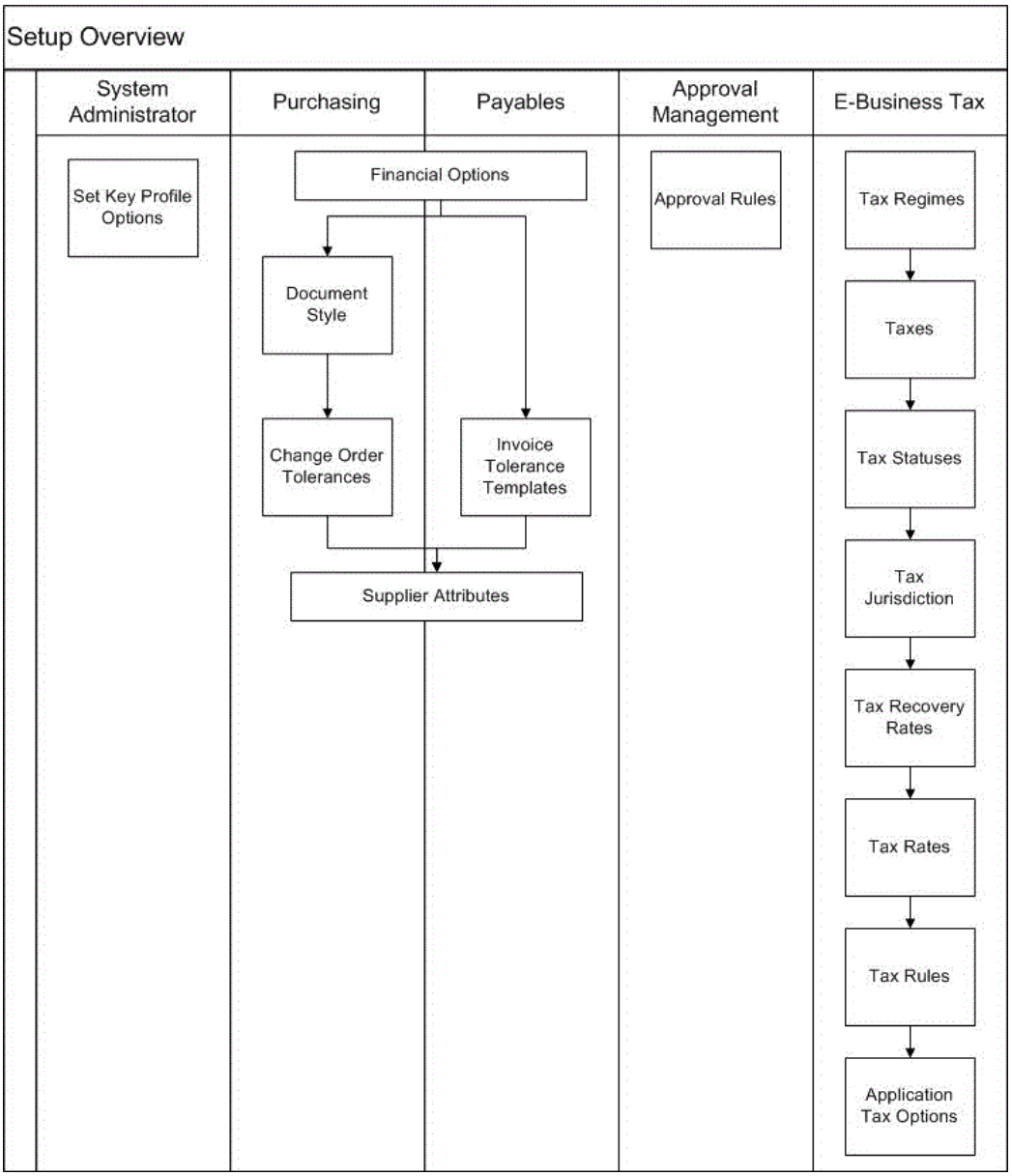
Overview of Setting Up Steps to Process the Procurement of Complex Work

This topic provides an overview of setting up steps to process the procurement of complex work.

The following table lists the setup steps and a reference to their Oracle Application.

Step No.	Step	Application	Comments
Step 1	Set Up Document Styles	Oracle Purchasing	Required
Step 2	Define Purchasing Profile Options	Oracle Purchasing	Required
Step 3	Set Up Supplier Change Order Tolerance	Oracle Purchasing	Required
Step 4	Set Up Change Order Tolerance	Oracle Purchasing	Required
Step 5	Set Up Financial Options	Oracle Purchasing	Required
Step 6	Set Up Invoice Tolerance Template	Oracle Purchasing	Required
Step 7	Set Up Supplier Sites	Oracle Purchasing	Required
Step 8	Create Projects	Oracle Projects	Required
Step 9	Define Approval Rules	Oracle Approvals Management	Optional, configure approval rules based on business needs.
Step 10	Define Procurement Contracts	Oracle Procurement Contracts	Required
Step 11	Define the Tax Structure	Oracle E-Business Suite	Required

The following diagram shows the different setup steps in Oracle Applications for the complex work procurement process.



For instructions on how to complete each step, refer to the following topics:

- Setting Up Steps in Oracle Purchasing to Process the Procurement of Complex Work, page 2-22
- Setting Up Steps in Oracle Approvals Management to Process the Procurement of Complex Work, page 2-36
- Setting Up Steps in Oracle E-Business Tax to Process the Procurement of Complex Work, page 2-37
- Setting Up Steps in Oracle Procurement Contracts to Process the Procurement of

Complex Work, page 2-41

Setting Up Steps in Oracle Purchasing to Process the Procurement of Complex Work

This topic describes the setup steps in Oracle Purchasing to process the procurement of complex work.

1. Define the Key Profile Option

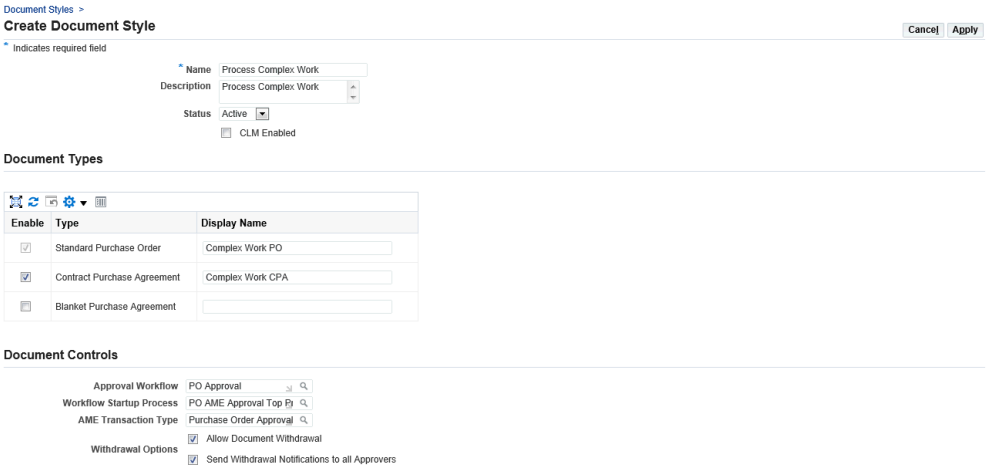
   POR : Amount Based Services Line Type: You must define this profile option that determines how services are to be quantified and ordered on the contract document. To use the Complex Services processes, the value of this profile option must be set to Fixed Price Services, which means that services will be ordered as a lump sum amount.

   - Fixed Price Services: Services will be ordered as Lump Sum Amount
   - Amount Based: Services will be ordered as a quantity with unit price as 1

2. Set Up Document Styles

   Purchase order document styles allow organizations to control the look and feel of the application to match the usage of the purchasing document.

   Use the Document Styles page (Setup > Purchasing > Document Styles) to create and update purchase order styles. This page enables you to create document styles for complex work orders (Actuals and Finance).



   To create a document style for the complex work process:

   In the Create Document Style page:

   - Enter details such as the name, description and status.

- Select the appropriate document types and enter the display name.
- Specify the document controls.

For more information on document types and document controls, refer to the Defining Document Styles topic in the *Oracle Purchasing User's Guide.*

Commodities

Purchase Bases ☑ Goods
☑ Services
☐ Temp Labor
Line Types All

Pricing

☑ Enhance Pricing

Controls

☑ Deliverable Hold Control

Complex Payments

☑ Advances
☑ Retainage
☑ Schedules
☑ Progress Payments
Pay Items ☑ Milestone
☑ Rate
☑ Lump Sum
☑ Treat Progress Payments as Contract Financing

When Oracle Services Procurement is licensed and installed:

- In the Commodities region, the purchase bases that apply to the complex work orders are goods and services. **Note**: The Temp Labor purchase basis is applicable to the procurement of contingent workers process only. If Services Procurement is implemented and you have enabled a Temp Labor basis, then select the Temp Labor check box to enable Price Differentials.
- The Complex Payments region in the Document Styles page is enabled and available for update. The Complex Payments region enables you to set up complex work order styles.

Define Pricing

In the Pricing region, select the Enhance Pricing check box to enable the Pricing

Transparency functionality.

Set Controls

Select the Deliverable Hold Control check box to initiate payment hold by deliverables under the Controls region. You can create a procurement contract deliverable that will place invoices on hold until the deliverable is submitted by the supplier and completed by the buyer. The Deliverable Hold Control option enables you to hold a payment independent of 'Pay when Paid'.

Enable the Complex Payments Attributes

- Check Advances if advance payments are to be allowed.
- Check Retainage if withholding of a portion of the payment until all work under a contract is accepted is to be allowed.
- Check Schedules if you want purchase orders using this document style to have schedules. The Schedules check box is not selected by default. If you select the Schedules check box, then the Purchase Order (in this case, the complex work order) using this document style will have schedules. When you save this document style, the Schedules check box is not updateable at a later point in time.
- Check Progress Payments to enable partial payments during performance of the contract. If Progress Payments is enabled, at least one pay item must be selected.
  - Milestone - Enable for payments based on progress events. Enabled by default for Goods line type.
  - Rate - Enable when payment amount is pro-rated based on the percentage of work completed.
  - Lump Sum - Enable when payment amount is a fixed amount based on the percentage of work completed.
- Initially, both check boxes (Schedules and Progress Payments) are unselected if Services Procurement is installed. You must select either Progress Payment or Schedules or both, otherwise an error message displays.
- Enable Treat Progress Payments as Contract Financing if it applies to the style's progress payments. The check box Treat Progress Payments as Contract Financing allows every payment released for work performed on the progress payment schedule to be treated as a financing payment that are recouped from payments for deliveries on the contract.

When the Progress Payments and Schedules check boxes are selected in the document style of the outcome document, users can create lines with or without

pay items in Sourcing documents.

- If the document style of the outcome document has Schedules and Progress Payments enabled, in the RFQ, if there are no pay items defined for those RFQ lines, then the lines are taken to be items which are to be received either at an Inventory location or at an Expense destination.

- If the document style of the outcome document has Schedules and Progress Payments enabled, in the RFQ, if there are pay items defined, then those lines are taken to be Pay item lines and the pay items are copied on to the order document; progress of these pay items are tracked using Work Confirmations.

If you select Advances and Retainage check boxes in the document style, then users can create standard purchase orders with advances and retainage.

In the Complex Payments region, if you select the Advances, Retainage and Schedules check boxes and if the Progress Payments and Treat Progress Payments as Contract Financing check boxes are not selected, then you will be able to create Standard Purchase Orders with Advances and Retainage.

However, if you select the Advances, Retainage and Schedules check boxes and if the Progress Payments and Treat Progress Payments as Contract Financing check boxes are not selected, then the document style supports the creation of Blanket Purchase Agreements as well.

When you save the document style, you cannot update the style with Complex Payments changes (Advances, Retainage, Progress Payments, Treat Progress Payments as Contract Financing) at a later point in time.

When the document style has Advances and Retainage enabled, then the following fields are available in the pages listed: Advance Amount, Recoupment Rate (%), Maximum Retainage Amount, Retainage Rate (%). Progress Payments Percentage is displayed when the Treat Progress Payment as Contract Financing check box is selected in the document style. The pages/documents are:

- Create Negotiation Line

- Review Negotiation Line

- View Negotiation

- Create Bid Line

- Review Bid Line

- View Bid

- Analyze by Line

- Award by Line

- Amendment History
- Create Template
- PDF Document

The following table displays the combination of various check boxes (controls) for different types of complex work orders using the Complex Payments region:

Advances	Retainage	Schedules	Progress Payments	Treat Progress Payments as Contract Financing	Description
Checked	Checked	Checked	Checked	Checked	This is a Financing Payments Complex Purchase Order. This order will have both Schedules and Pay Items Tab
Checked	Checked	Checked	Checked	Unchecked	This is a Delivery Payments Complex Purchase Order. This order will have both Schedules and Pay Items Tab

Advances	Retainage	Schedules	Progress Payments	Treat Progress Payments as Contract Financing	Description
Checked	Checked	Checked	Unchecked	Unchecked	This is a Standard Purchase Order. This order will have only Schedules tab. Users can record information related to Advances and Retainage in Standard Purchase order.
Checked	Checked	Unchecked	Checked	Unchecked	This is a Delivery Payments Complex Purchase Order. This Order will have only Pay Items Tab
Checked	Checked	Unchecked	Checked	Checked	This is a Financing Payments Complex Purchase Order. This Order will have only Pay Items Tab

Advances	Retainage	Schedules	Progress Payments	Treat Progress Payments as Contract Financing	Description
Unchecked	Unchecked	Checked	Checked	Checked	This is a Financing Payments Complex Purchase Order. This Order will have both Schedules and Pay Items Tab. Advances or Retainage cannot be specified for the order
Unchecked	Unchecked	Checked	Checked	Unchecked	This is a Delivery Payments Complex Purchase Order. This Order will have both Schedules and Pay Items Tab. Advances or Retainage cannot be specified for the order

Advances	Retainage	Schedules	Progress Payments	Treat Progress Payments as Contract Financing	Description
Unchecked	Unchecked	Checked	Unchecked	Unchecked	This is a Standard Purchase Order. This order will have only Schedules tab. Advances or Retainage cannot be specified for the order.
Unchecked	Unchecked	Unchecked	Checked	Unchecked	This is a Delivery Payments Complex Purchase Order. This Order will have only Pay Items Tab. Advances or Retainage cannot be specified for the order
Unchecked	Unchecked	Unchecked	Checked	Checked	This is a Financing Payments Complex Purchase Order. This Order will have only Pay Items Tab. Advances or Retainage cannot be specified for the order

If Services Procurement is installed and if document styles exist, then the Schedules check box is unselected. You cannot update the Schedules check box for existing document styles.

3. Set Up Supplier Change Order Tolerance

   Auto-Approval Tolerances are specified for Supplier initiated Change Requests on the Progress Payment Schedule. Buyers can specify a tolerance based on a percentage or dollar amount of pay item quantity and pay item amount. If the requested change falls within the limits defined by this band, it is automatically approved and the contract is updated.

Supplier Change Order

Buyer Auto-Acceptance Tolerances

Attribute	Measure	Maximum Increment	Maximum Decrement
Document Amount	%	25	25
Document Amount	USD	1,000.00	1,000.00
Unit Price	%	25	25
Line Amount	%	25	25
Line Amount	USD	1,000.00	1,000.00
Schedule Quantity	%	25	5
Schedule Amount	%	25	25
Schedule Amount	USD	1,000.00	1,000.00
Pay Item Quantity	%	10	0
Pay Item Amount	%	100	0
Pay Item Amount	USD	500.00	0.00
Promised Date	Days	0	0

Routing

Select any of the following attributes for which supplier change request should be routed to requester for approval.

- [x] Promised Date
- [x] Schedule Quantity
- [x] Price (for lines from a non-catalog requisition)

   Use the Supplier Change Order page (Setup : Tolerances and Routings) to define tolerances and routing for buyer auto-acceptance. Oracle iSupplier Portal uses these tolerances.

4. Set Up Change Order Tolerance

   Auto-approval tolerances are specified for Buyer initiated changes on the Progress Payment Schedule. A tolerance is specified based on a percentage of pay item price,

quantity and amount. If the requested change falls within the limits defined by this band, it is automatically approved and the contract is updated.

Specify auto approval tolerance for pay item changes:

- Pay Item Price
- Pay Item Quantity
- Pay Item Amount

Change Order

Auto-Approval Tolerances for Agreements

Attribute	Measure	Maximum Increment
Header Amount Agreed	%	0
Header Amount Limit	%	0
Unit Price	%	0
Price Limit	%	0
Line Quantity Agreed	%	0
Line Amount Agreed	%	0
Price break - Quantity	%	0
Price break - Price	%	0

Auto-Approval Tolerances for Orders

Attribute	Measure	Maximum Increment
PO Amount	%	100
Header Amount Limit	%	100
Unit Price	%	100
Line Quantity	%	100
Line Amount	%	100
Schedule Quantity	%	100
Schedule Amount	%	100
Pay Item Price	%	100
Pay Item Quantity	%	100
Pay Item Amount	%	100
Distribution Quantity	%	100
Distribution Amount	%	100
Contractor Start Date	Days	5
Contractor End Date	Days	5
Need-By Date	Days	5
Promised Date	Days	0

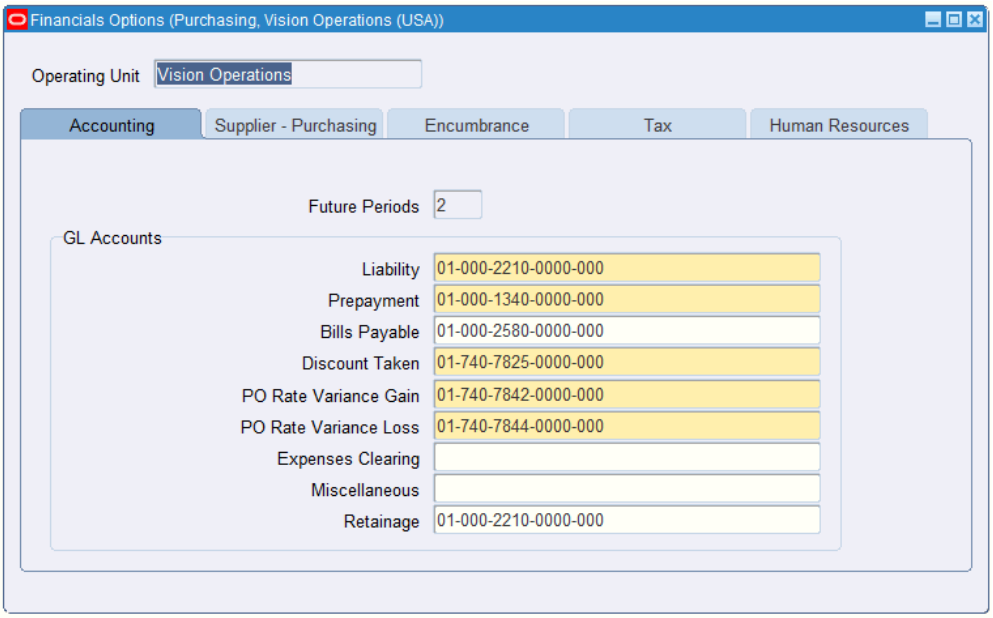
Auto-Approval Tolerances for Releases

Attribute	Measure	Maximum Increment
Schedule Price	%	0
Schedule Quantity	%	0
Schedule Amount	%	0
Distribution Quantity	%	0
Distribution Amount	%	0
Need-By Date	Days	0
Promised Date	Days	0

Use the Change Order page (Setup : Tolerances and Routings) to define tolerances for auto-approval of agreements, orders, and releases. Oracle Purchasing uses these tolerances.

5. Set Up Financial Options

   Set the Retainage Account for the Operating Unit in the Financial Options page (Setup: Organizations > Financial Options).

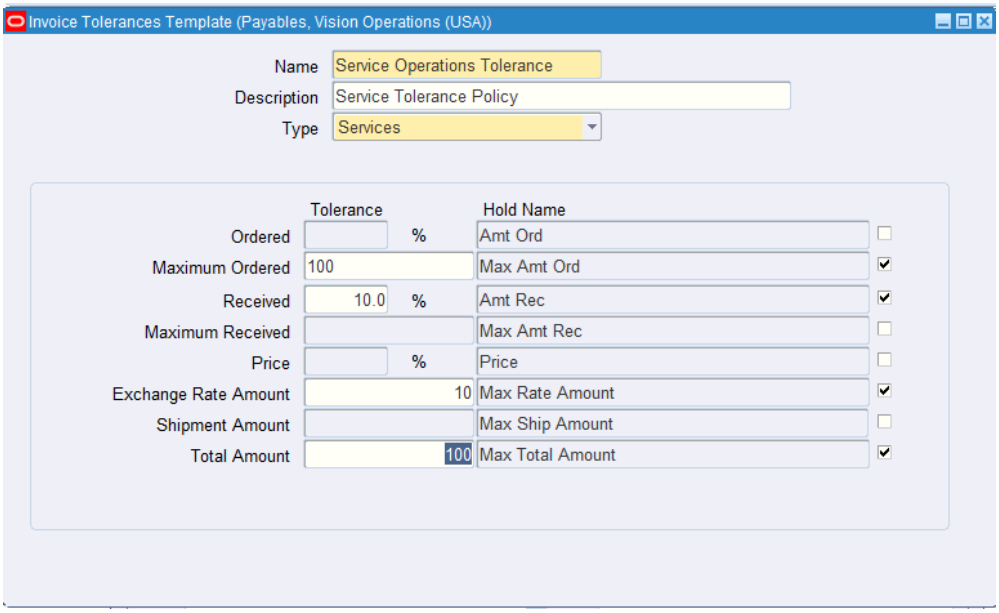


Define one retainage account for the Operating Unit to account for funds withheld from suppliers doing business with the organization.

6. Set Up Invoice Tolerance Template

The tolerance between Amount being invoiced and the amount planned on the Services Procurement contract or the work to date represented by the approved Work confirmations is defined in the Invoice Tolerance Template window. The variance is defined as both percentage–based and amount–based tolerances.

The tolerance templates are defined for goods or services and the most appropriate templates will be assigned to the supplier sites. This allows the users to manage tolerances values centrally yet assign the policies at the trading partner location.



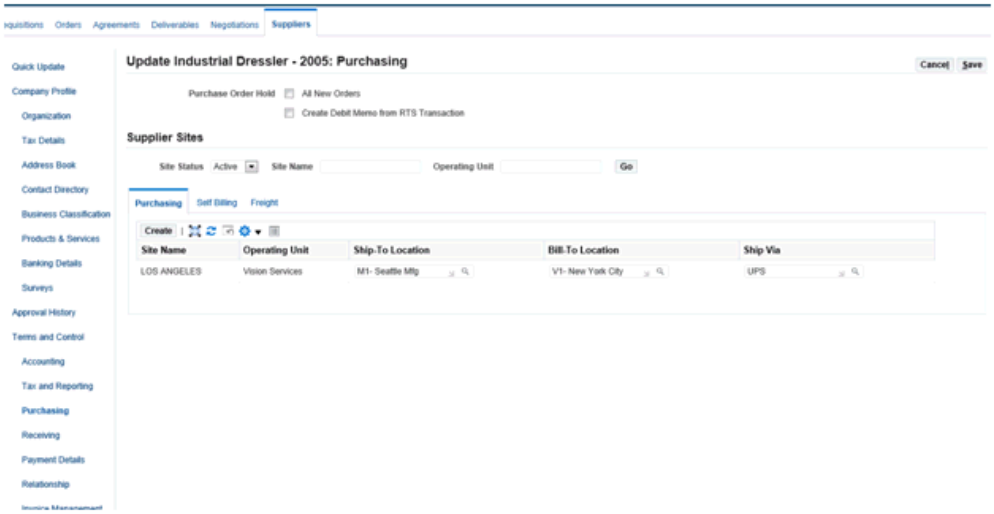
Using an appropriate Payables responsibility, navigate to Setup: Invoice to open the Invoice Tolerance Template window.

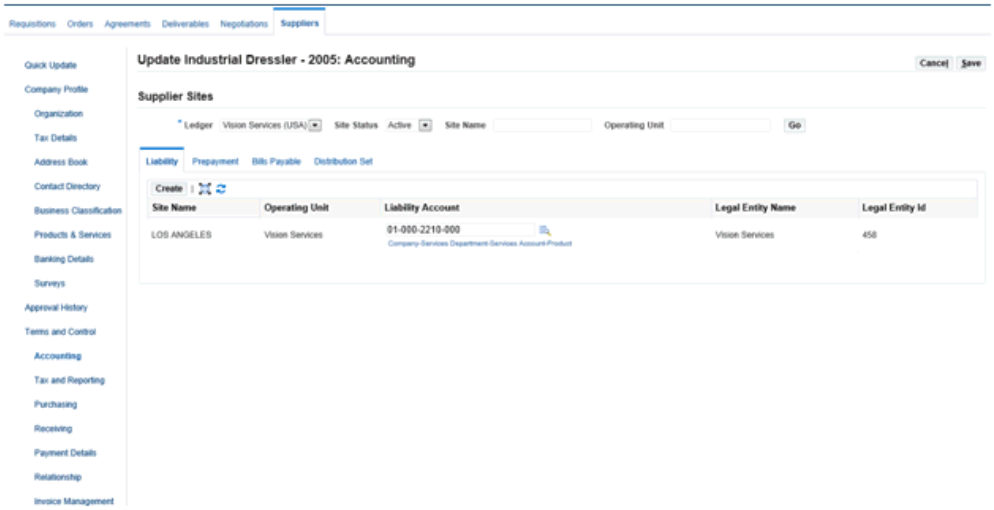
7. Set Up Supplier Sites

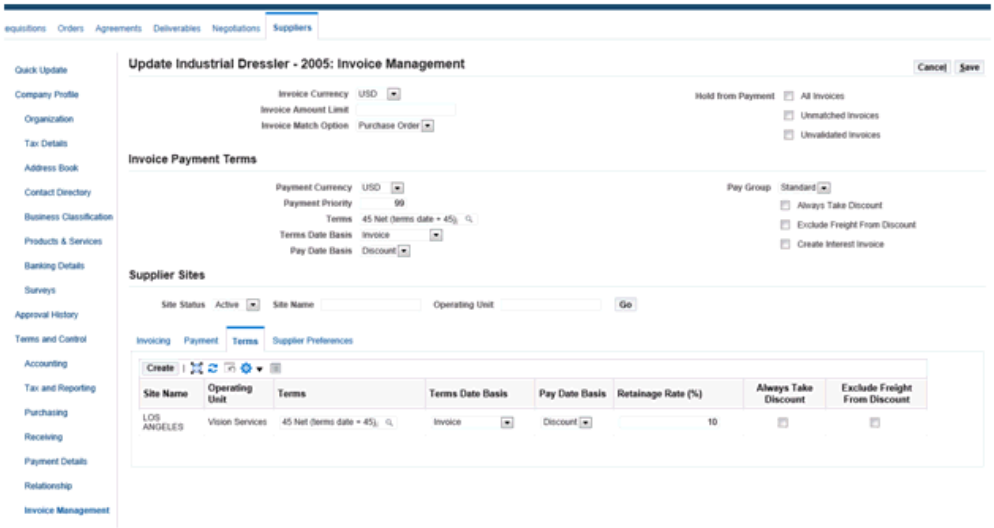
   This setup task is required to record information about individuals and companies from whom the customer purchases goods and services. Tax registrations and profiles are defined for the supplier. Additionally, the buying Organization can specify Payables accounting defaults, the Invoice Match Option that will default to the purchase order, Invoice Tolerance Templates for Goods and Services, and a unique Retainage Rate for each Supplier Site.

   Users may maintain the retainage rate based on past performance and the contractor's history. So when a contract is created with this supplier site, the retainage rate defined here will default onto the contract.

   Navigate to the Buyer Work Center > Suppliers tab to add information about suppliers.

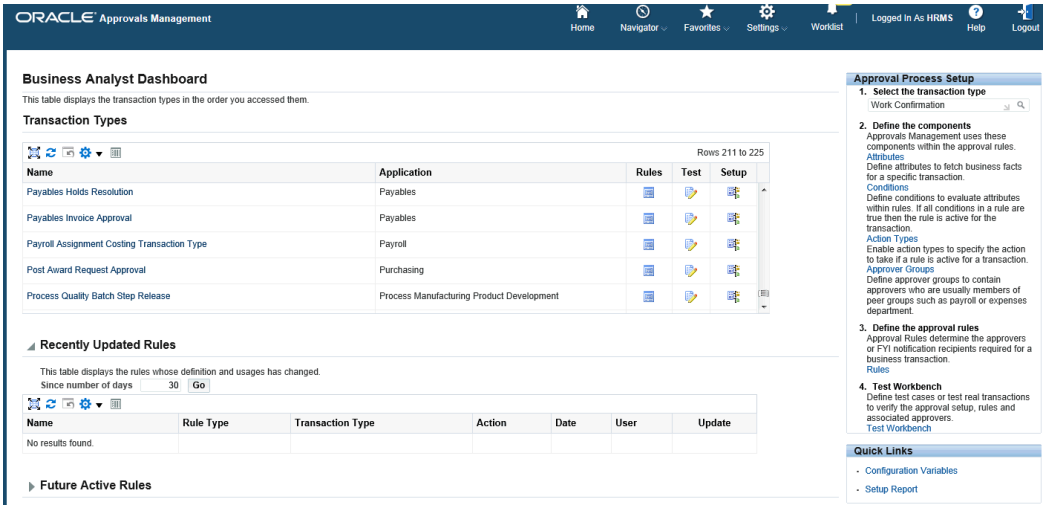

Requisitions Orders Agreements Deliverables Negotiations Suppliers
Quick Update
Company Profile
Organization
Tax Details
Address Book
Contact Directory
Business Classification
Products & Services
Banking Details
Surveys
Approval History
Terms and Control
Accounting
Tax and Reporting
Purchasing
Receiving
Payment Details
Relationship
Update Industrial Dressler - 2005: Purchasing
Cancel Save
Purchase Order Hold
All New Orders
Create Debit Memo from RTS Transaction
Supplier Sites
Site Status Active
Site Name
Operating Unit
Go
Purchasing Self Billing Freight
Create
Site Name
Operating Unit
Ship-To Location
Bill-To Location
Ship Via
LOS ANGELES
Vision Services
M1- Seattle Mfg
V1- New York City
UPS


Requisitions Orders Agreements Deliverables Negotiations Suppliers
Quick Update
Company Profile
Organization
Tax Details
Address Book
Contact Directory
Business Classification
Products & Services
Banking Details
Surveys
Approval History
Terms and Control
Accounting
Tax and Reporting
Purchasing
Receiving
Payment Details
Relationship
Invoice Management
Update Industrial Dressler - 2005: Accounting
Cancel Save
Supplier Sites
* Ledger Vision Services (USA)
Site Status Active
Site Name
Operating Unit
Go
Liability Prepayment Bills Payable Distribution Set
Create
Site Name
Operating Unit
Liability Account
Legal Entity Name
Legal Entity Id
LOS ANGELES
Vision Services
01-000-2210-000
Vision Services
458



Setting Up Steps in Oracle Approvals Management to Process the Procurement of Complex Work

Oracle Approvals Management is a common module which provides users the ability to configure rules which determine the approvers within the enterprise for business transactions or activities.



- The Work Confirmation transaction type allows rule configuration for determining the most appropriate person to evaluate, certify and approve the work confirmation. This could be a field engineer, a project manager or even an architect.
- The Payables Holds Resolution transaction type allows rule configuration for determining the most appropriate person to research, negotiate, and resolve invoice

tolerance holds.

- The Payables Invoice Approval transaction type allows rule configuration to support line level and document level approvals plus optional rules which allows users to forgo invoice approval if the invoice is matched to a purchase order.

You can use the delivered approval rules and transaction types or create your rules and transaction types to suit your business requirements. For more information on approval management, see: *Oracle Approvals Management Implementation Guide*.

Setting Up Steps in Oracle E-Business Tax to Process the Procurement of Complex Work

This topic describes the setup steps in Oracle E-Business Tax to process the procurement of complex work.

Oracle E-Business Tax provides a single point solution for managing your transaction-based tax requirements. E-Business Tax delivers tax services to all E-Business Suite business flows through one application interface. As a global system architecture, E-Business Tax is configurable and scalable for adding and maintaining country-specific tax content.

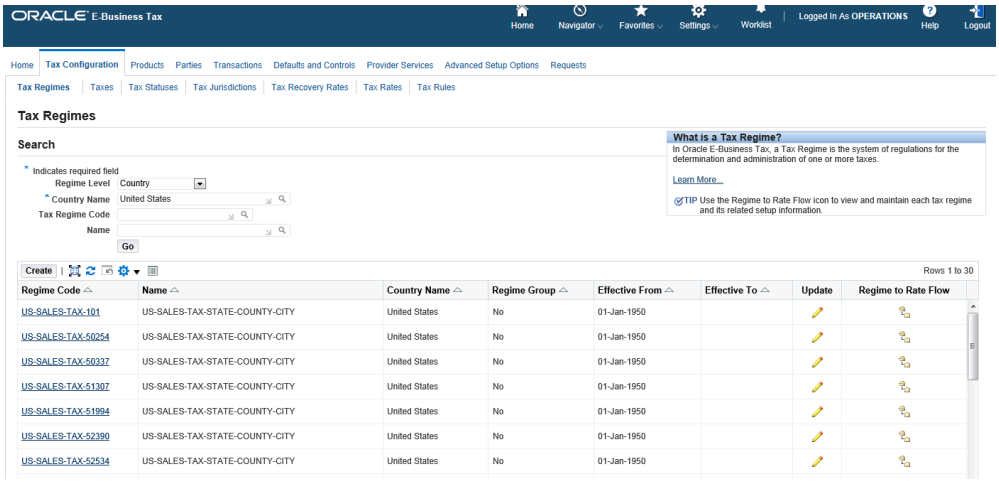
Use the appropriate Tax Administrator responsibility, Tax Configuration function to set up the following to process complex work orders:

- Tax regimes
- Taxes
- Tax statuses
- Tax jurisdictions
- Tax recovery rates
- Tax rates
- Tax rules

For more information about the setup steps in this section, refer to the *Oracle E-Business Tax Implementation Guide And Oracle E-Business Tax User Guide*.

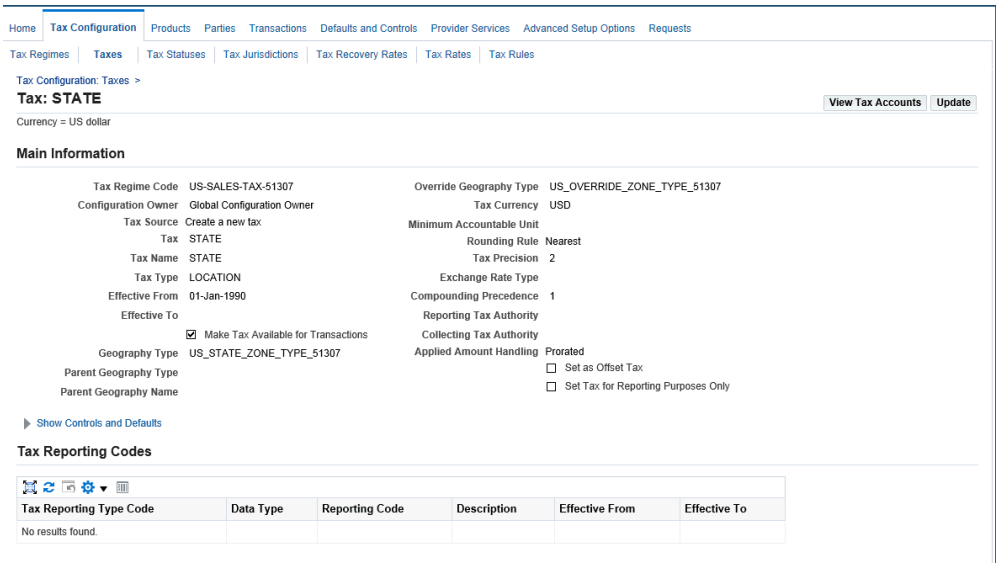
1. Set Up Tax Regimes

   Tax regime is the system of regulations for the determination and administration of one or more taxes. Tax regime definition is used to identify the taxes that need to be applied on the purchase order document.



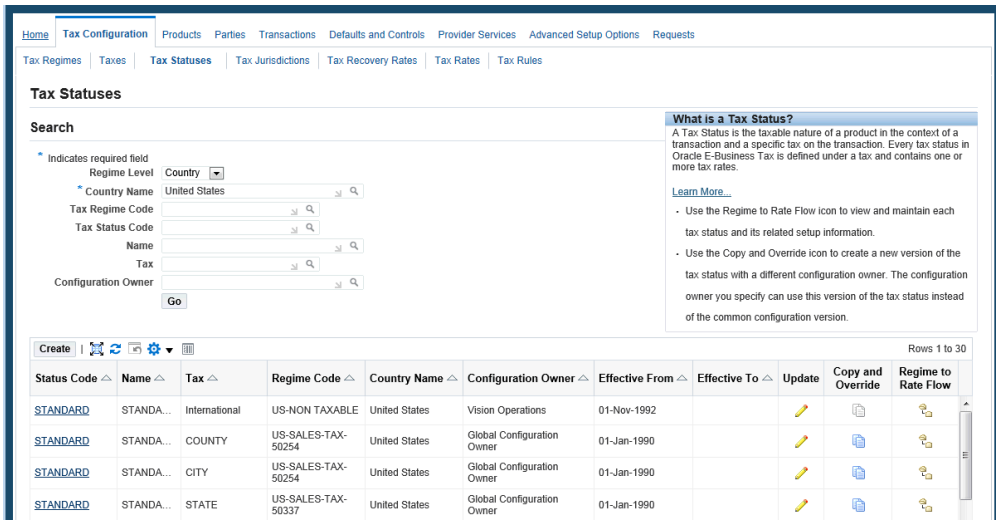
2. Set Up Tax

   A Tax is a distinct charge imposed by a government through a fiscal or tax authority. Every tax in Oracle E-Business Tax is defined under a tax regime.



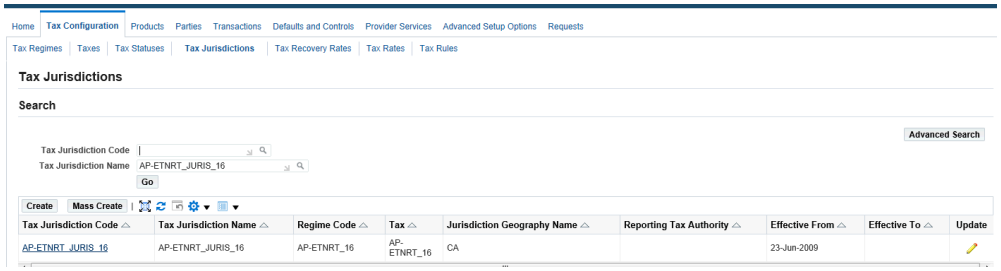
3. Set Up Tax Status

   A Tax Status is the taxable nature of a product in the context of a transaction and a specific tax on the transaction. Tax statuses are defined to group one or more tax rates that are of the same or similar nature. Every tax status in Oracle E-Business Tax is defined under a tax and contains one or more tax rates.



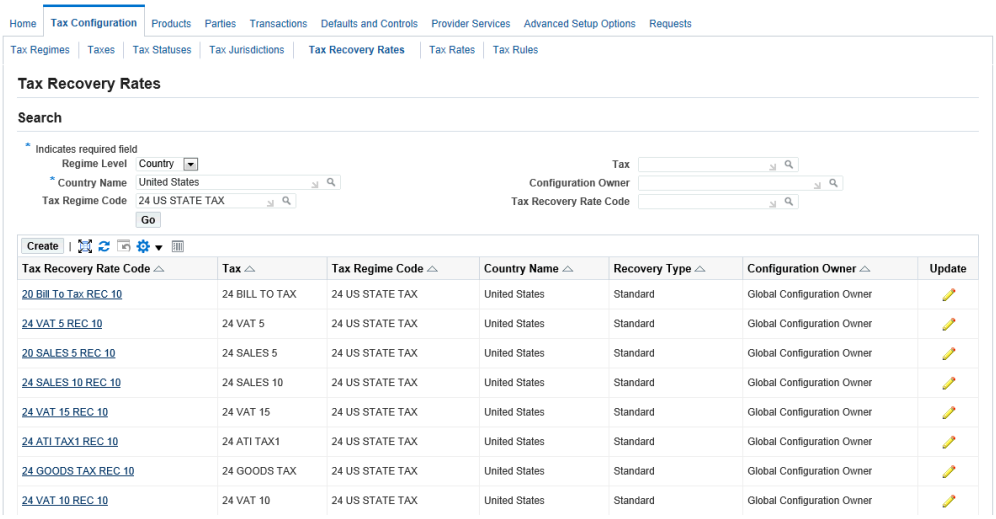
4. Set Up Tax Jurisdictions

The incidence of a tax on a specific geographic area is called a Tax Jurisdiction. A tax jurisdiction is limited by a geographical boundary that encloses a contiguous political or administrative area, most commonly the borders of a country.



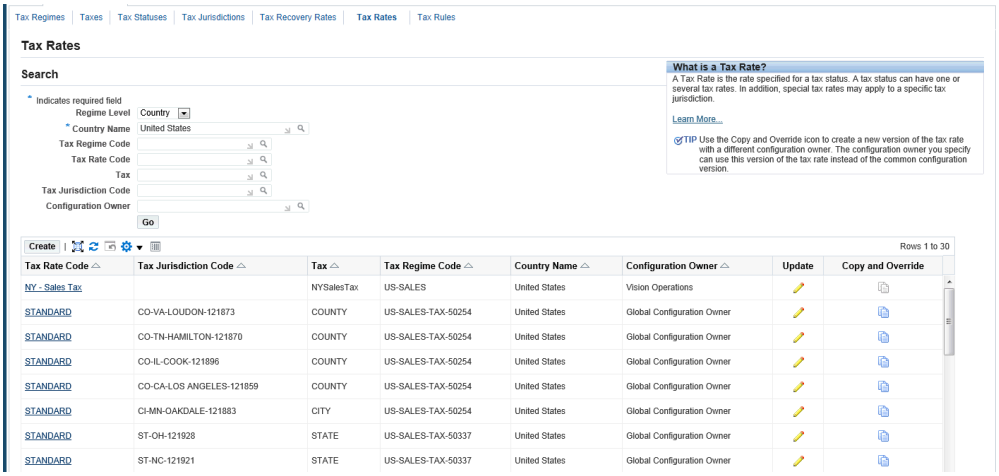
5. Set Up Tax Recovery Rates

A recoverable tax is a tax that allows full or partial recovery of taxes paid on purchases, either as a recoverable payment or as an offset against taxes owed.



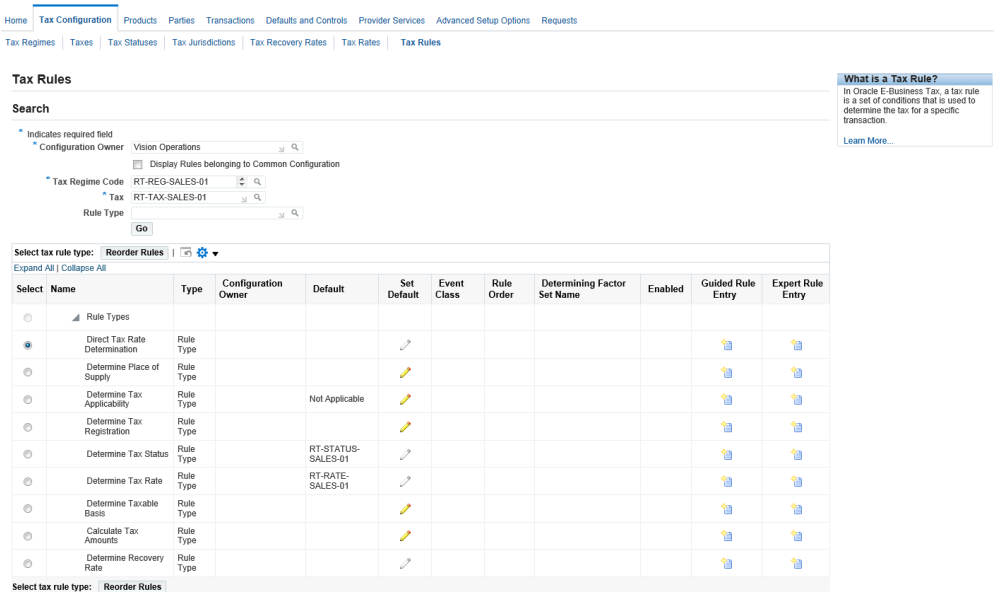
6. Set Up Tax Rates

   A Tax Rate is the rate specified for a tax status. A tax status can have one or several tax rates. In addition, special tax rates may apply to a specific tax jurisdiction.



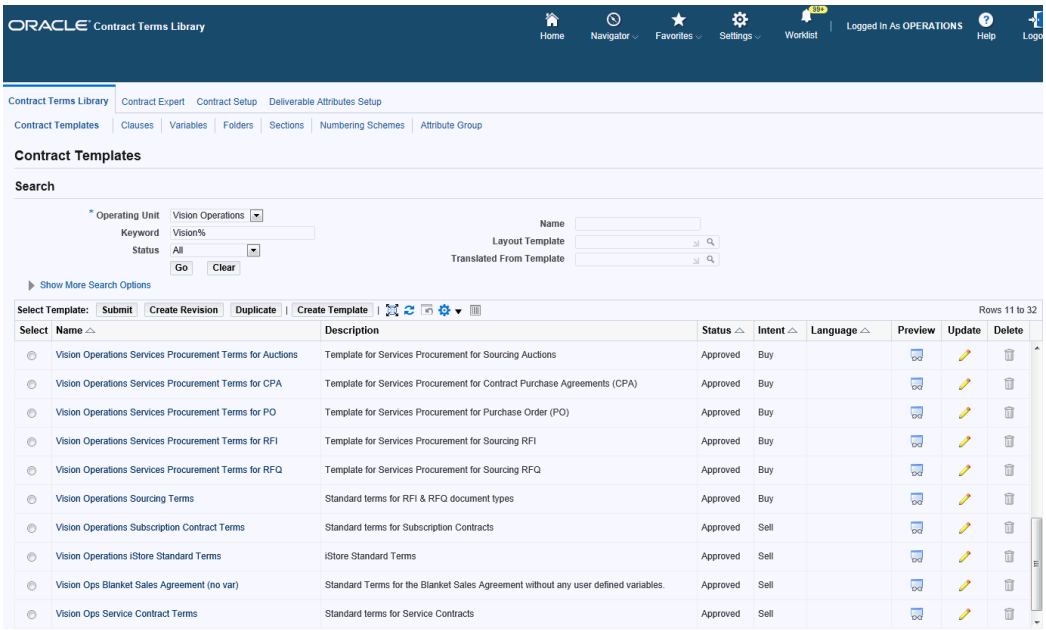
7. Set Up Tax Rules

   In Oracle E-Business Tax, a tax rule is a set of conditions that is used to determine the tax for a specific transaction.



Setting Up Steps in Oracle Procurement Contracts to Process the Procurement of Complex Work

If Oracle Procurement Contracts is installed and licensed, then you can create contract terms and apply them to sourcing negotiations . You can use contract terms to specify legal and other requirements for your negotiations.



Use the Contracts Terms Library Administrator responsibility to create and maintain clauses and contract templates in the Contract Terms Library. Use the Manage Contract Terms responsibility to create and maintain contract terms on negotiation documents.

Overview of Setting Up Steps to Process the Procurement of Contingent Workers

This topic provides an overview of each step you need to complete to set up steps to process the procurement of contingent workers.

The following table lists the setup steps and a reference to their Oracle Application.

Step No.	Step	Application	Comments
Step 1	Set Up Line Types	Oracle Purchasing	Required
Step 2	Create Jobs	Oracle Human Resources	Required
Step 3	Create Projects	Oracle Projects	To process project-based timecard entries

Step No.	Step	Application	Comments
Step 4	Create Purchasing Categories and Assign to Category Set	Oracle Purchasing	Required
Step 5	Associate Jobs to Purchasing Categories	Oracle Purchasing	Required
Step 6	Enable/Disable Price Differential Lookup Codes	Oracle Purchasing	Required
Step 7	Create Suppliers	Oracle Purchasing	Required
Step 8	Define Purchasing Contingent Worker Profile Options	Oracle Purchasing	Required
Step 9	Create Information Templates	Oracle iProcurement	Optional
Step 10	Create Service Templates Using Smart Forms	Oracle iProcurement	Optional
Step 11	Create Category Descriptors to Use the Rate Card Feature	Oracle iProcurement Oracle Purchasing	Optional
Step 12	Create Contingent Workers	Oracle Human Resources	Required
Step 13	Define Users for Contingent Workers	Common Applications	Required
Step 14	Set Up Oracle HR Contingent Worker Profile Options	Oracle Human Resources	Required
Step 15	Define Timecards Layouts for Contingent Worker Time Entries	Oracle Time and Labor	Required

Step No.	Step	Application	Comments
Step 16	Setup Preferences for Self-Service Timecard Entries	Oracle Time and Labor	Required
Step 17	Set Up Purchase Order Integration with Oracle Projects	Oracle Projects	Required to process project-based timecard entries
Step 18	Define Projects Contingent Worker Profile Options	Oracle Projects	Required to process project-based timecard entries
Step 19	Set Up Steps in Oracle Internet Expenses	Oracle iExpenses	Integration Oracle Projects, Oracle Payables, and Oracle iExpenses

For instructions on how to complete each step, refer to the following topics:

- Setting Up Steps in Oracle Purchasing to Process the Procurement of Contingent Workers , page 2-50
- Setting Up Steps in Oracle iProcurement to Process the Procurement of Contingent Workers, page 2-44
- Setting Up Steps in Oracle Human Resources to Process the Procurement of Contingent Workers, page 2-56
- Setting Up Steps in Oracle Time and Labor to Process the Procurement of Contingent Workers, page 2-64
- Setting Up Steps in Oracle Internet Expenses to Process the Procurement of Contingent Workers, page 2-67
- Setting Up Steps in Oracle Projects to Process the Procurement of Contingent Workers, page 2-68

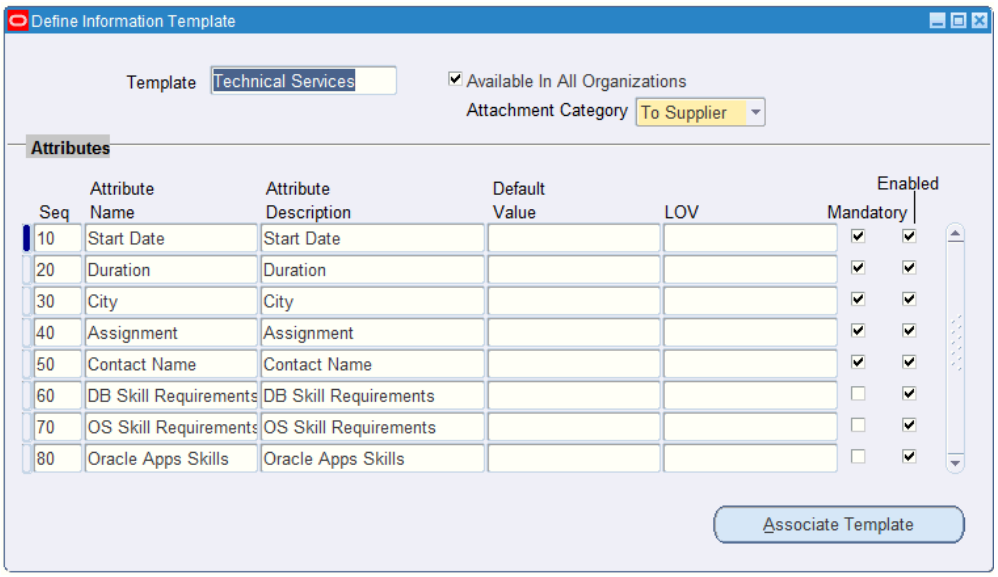
Setting Up Steps in Oracle iProcurement to Process the Procurement of Contingent Workers

This topic describes the set up steps in Oracle iProcurement to process the procurement of contingent workers.

1. Create Information Templates

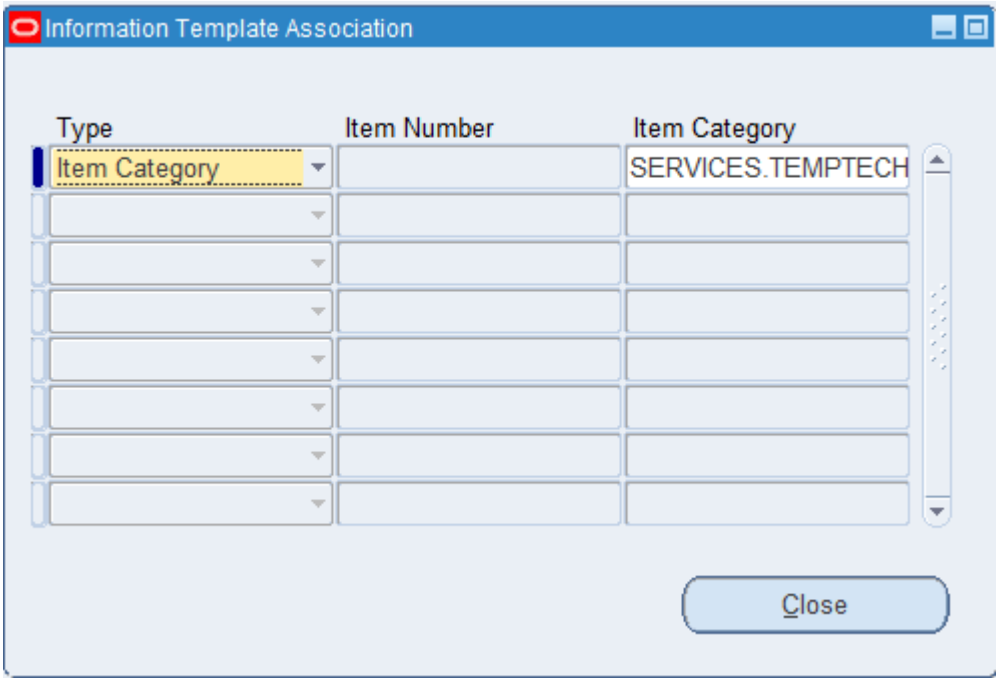
   Oracle iProcurement uses information templates to pass additional required information to the supplier. Common attributes such as supplier, price, currency, description of service and category are always captured on a service request. Any additional unique attributes are captured via the information template.

   Associate Information Templates to Purchasing Categories so that the template is visible during the Contractor Request flow in Oracle Procurement. For example, for a health care worker you may want to capture information on status of immunizations versus capturing information on knowledge of programming languages for an Engineer. The user can make any attribute either mandatory or optional and may reference default values.



   Information Templates are set up in Purchasing using the Define Information Template window. Using a Purchasing responsibility, navigate to Setup > Information Templates.

   Use the Information Template Association window to associate the template with an item or item category.



For more information, refer to the *Oracle iProcurement Implementation and Administration Guide*.

2. Create Service Templates Using Smart Forms

   Requesters procure an item or service that is not found in the catalog. For these cases, they use a non-catalog request. The non-catalog request offers the ability to add an item or service to the shopping cart based on a description of the item or service. Through the use of smart forms, companies can conveniently control both the list of fields and whether a particular field is enterable or pre-defined. For example, create different services template for procuring services like legal services, painter, interior decorator. Legal services for visa applications, home purchases and will preparation could all be requested from the Legal Services Store. Each type of legal service could have an individual template so that the appropriate preferred supplier is communicated to the user and/or to ensure all mandatory attributes are captured on the service requisition.

   Service Templates are created by the Catalog Administrator in Oracle iProcurement. Navigate to the Smart Forms page and link the template to stores in iProcurement

Agreements | Stores | Schema | Configuration

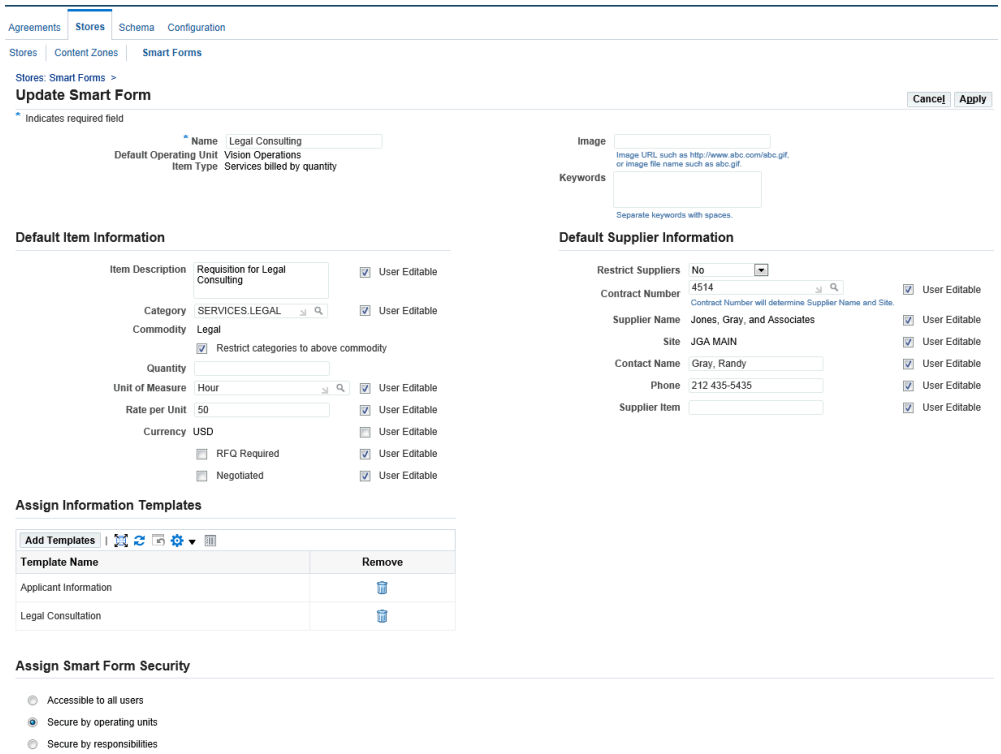
Stores | Content Zones | Smart Forms

Manage Smart Forms

Search

Create Smart Form

Name	Item Type	Operating Unit	Store Assignment	Update	Copy	Delete
Default	Multiple	All Operating Units				
Legal Consulting	Services billed by quantity	Vision Operations	Legal Services			
Legal Consulting (Progress UK)	Services billed by quantity	Progress UK	Legal Services (Progress UK)			
Legal Consulting (Vision UK)	Services billed by quantity	Vision Industries	Legal Services (Vision UK)			
Legal Cosulting (Progress S&L)	Services billed by quantity	Progress Master	Legal Services (Progress S&L)			
PAL Smart Form	Goods billed by quantity	APFINQA1_16	PAL Store			
Patents and Trademarks	Goods or services billed by amount	Vision Operations	Multiple			
Patents and Trademarks (Progress S&L)	Goods or services billed by amount	Progress Master	Legal Services (Progress S&L)			
Patents and Trademarks (Progress UK)	Goods or services billed by amount	Progress UK	Legal Services (Progress UK)			
Patents and Trademarks (Vision UK)	Goods or services billed by amount	Vision Industries	Legal Services (Vision UK)			
QSANITYFORM	Goods billed by quantity	Vision Operations	QSANITYSTORE			
Travel Visa Requisition	Goods or services billed by amount	Vision Operations	Legal Services			
Travel Visa Requisition (Progress S&L)	Goods or services billed by amount	Progress Master	Legal Services (Progress S&L)			
Travel Visa Requisition (Progress UK)	Goods or services billed by amount	Progress UK	Legal Services (Progress UK)			
Travel Visa Requisition (Vision Services)	Goods or services billed by amount	Vision Services	Legal Services (Vision Services)			
Travel Visa Requisition (Vision UK)	Goods or services billed by amount	Vision Industries	Legal Services (Vision UK)			



3. Create Category Descriptors to Use the Rate Card Feature

   Hiring managers and purchasing users can view the rate card that provides details of the job and the standard rate that they should be paying for the job. Users can also view differential rates based on rate uplifts, offshore / onshore rates, markup driven rates, and location driven rates.

   Key benefits include:

   - Job Standardization via rate card support and standard rates for each job.
   - Benchmarking of job rates for specific jobs.
   - Ability to automatically identify preferred suppliers based on hiring needs.

   When creating contractor requests in Oracle iProcurement, the 'Use Standardized Job rates' option offers hiring managers the rate card, which provides a list of details about the job that will help the hiring manager to identify the right resource for the project. This region also provides the hiring manager with the ability to view the rate differentials and markup rates for the job in different locations.

   To enable requesters to use job standardization through the rate cards feature, complete the following steps:

   1. Create item categories using the Create or Update Item Category page in Oracle iProcurement.

2. Associate a job to a shopping category using the Create or Update Job and Category Association page in Oracle Purchasing.

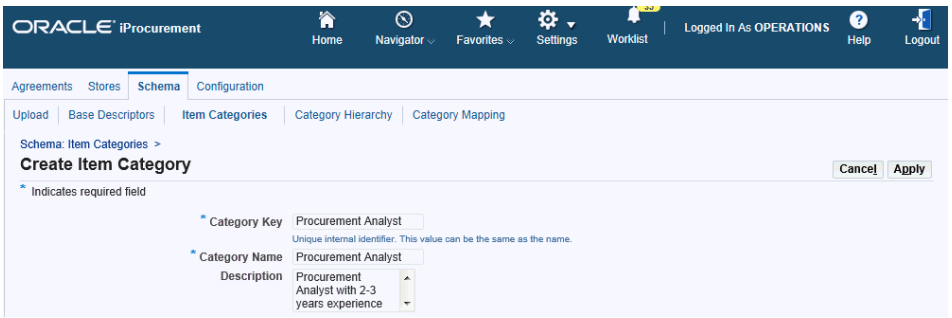
3. Create and associate descriptors to a shopping category using the Manage Category Descriptors page in Oracle iProcurement.

Create Item Categories:

1. Log in using the iProcurement Catalog Administrator responsibility.

2. Click the Schema tab and then the Item Categories subtab.

3. Click Create Category in the Item Categories page. The Create Item Category page appears to create the item category.



Associate a Job to a Shopping Category:

For information on how to associate a job to a shopping category, see the Create Job and Shopping Category Association section in the *Setting Up Steps in Oracle Purchasing to Process the Procurement of Contingent Workers* topic.

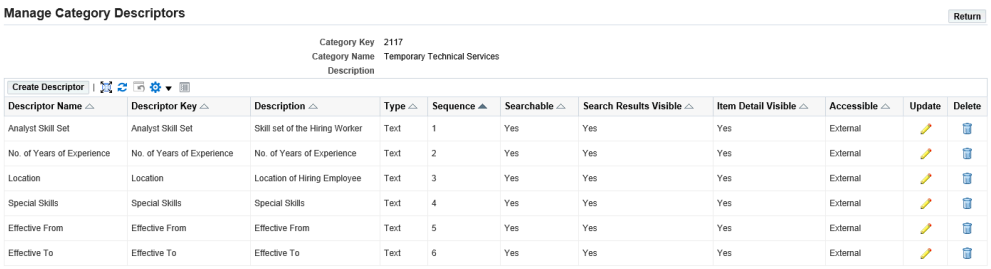
Create and Associate Descriptors to a Shopping Category:

1. Log in to Oracle Purchasing.

2. Navigate to the Associate Jobs with Categories page and click Create.

3. In the Create Job and Category Association page, enter the details required to create the job and category association.

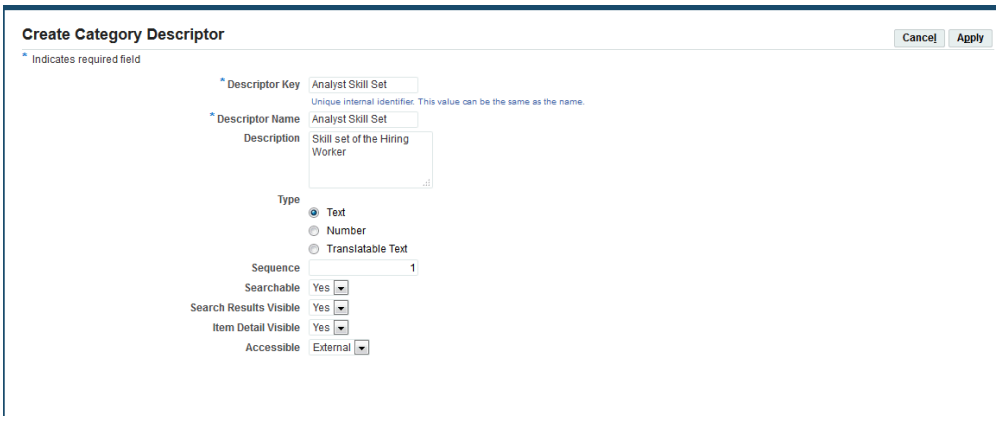
When creating a job and category association, select the Shopping Category field to create category descriptors. The Manage Category Descriptors link is visible and active only if a shopping category is specified for the Job – Purchasing category combination.



Descriptor Name	Descriptor Key	Description	Type	Sequence	Searchable	Search Results Visible	Item Detail Visible	Accessible	Update	Delete
Analyst Skill Set	Analyst Skill Set	Skill set of the Hiring Worker	Text	1	Yes	Yes	Yes	External		
No. of Years of Experience	No. of Years of Experience	No. of Years of Experience	Text	2	Yes	Yes	Yes	External		
Location	Location	Location of Hiring Employee	Text	3	Yes	Yes	Yes	External		
Special Skills	Special Skills	Special Skills	Text	4	Yes	Yes	Yes	External		
Effective From	Effective From	Effective From	Text	5	Yes	Yes	Yes	External		
Effective To	Effective To	Effective To	Text	6	Yes	Yes	Yes	External		

The Manage Descriptors page opens in Oracle iProcurement. and enables you to define descriptors for the shopping category. These descriptors are displayed in the contractor request as well as in other related documents. When a job is selected during contractor request creation in Oracle Procurement, then the descriptors associated to the shopping category are displayed for the hiring manager to provide the required details.

To create a category descriptor, click Create in the Manage Category Descriptors page.



Setting Up Steps in Oracle Purchasing to Process the Procurement of Contingent Workers

This topic describes the set up steps in Oracle Purchasing to process the procurement of contingent workers. For more information on the steps discussed in this topic, refer to the *Oracle Purchasing User's Guide*.

Using Services Procurement, buyers create purchase orders to procure rate-based services.

1. Set Up Line Types in Oracle Purchasing

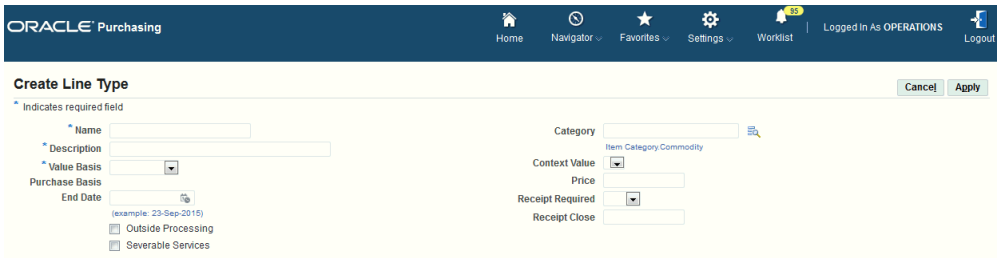
   Oracle Purchasing provides the line type feature to differentiate orders for goods from those for services or outside processing. In addition, the services related line types support a broad range of service categories including general business

services, consulting services, and contingent labor. You use rate based line types when you are ordering services on a fee per unit basis. For example, you might order consulting services at $250 per hour.

To process procurement of contingent workers, define rate based temp labor line type with 'Rate' as the value basis and 'Temp Labor' as the purchase basis. For Rate based temporary labor, Billing is based on a per unit rate such as per hour.

- Value basis reflects how you wish to value the purchase. The 'Rate' value basis enables users to enter services by rate (price) and amount. Receive items by amount. The line types with a rate value basis the unit of measure class is restricted by the setting of the profile PO: UOM Class for Temp Labor Service.

- Purchase basis indicates the nature of the purchase and determines the attributes that are required. Set up temporary labor purchase basis line types to enter purchasing documents to pay contingent worker providers.



Create Line types in Oracle Purchasing (Setup > Purchasing > Line Types).

Rate differentials such as overtime, holiday, shifts, etc. may be captured along with the base rate. Labor and expense budgets may be tracked separately.

2. Create Purchasing Category and Assign to Category Set

   For every item, there has to be a Purchasing Category set where the user defines the Structure name, Category, description and enablement for iProcurement. These categories are assigned to Purchasing category sets.

Categories

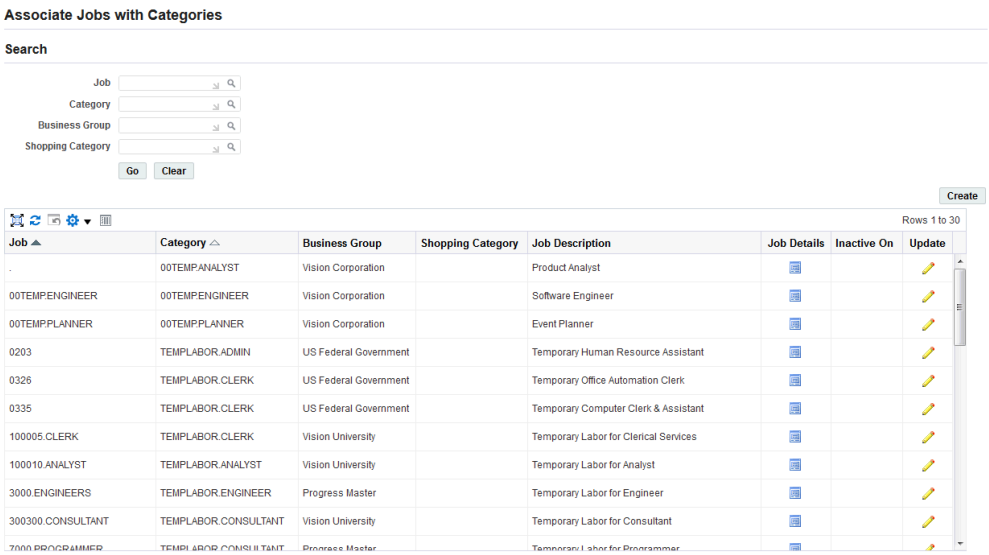
Structure Name	Category	Description	Enabled	Inactive On	Viewable by Supplier	[ ]
Accounting Category	EX	Expense Inventory Iter	✓		✓	-
Accounting Category	FG	Finished Goods Item	✓		✓	-
Accounting Category	PU	Purchased Item,Raw M	✓		✓	-
Accounting Category	SA	Sub Assembly Item	✓		✓	-
Allocation Class	AUTOFEFO	Automatic First-Expire	✓		✓	-
Allocation Class	AUTOFIFO	Automatic First-In-Firs	✓		✓	-
Allocation Class	GRP1	Group I (Process)	✓		✓	-
Allocation Class	GRP2	Group 2 (Process)	✓		✓	-
Allocation Class	GRP3	Group 3 (Process)	✓		✓	-
Allocation Class	MANUAL	Manual FIFO	✓		✓	-

Use the Categories window (Setup > Items > Categories > Category Codes > New) to define categories.

3. Associate Jobs to Purchasing Categories

   Jobs are created in Human Resource responsibility. Only jobs that are defined in Human Resource responsibility and assigned to a Purchasing Category are procured through Services Procurement. This setup is required for the entry of temp labor line types. When assigning a purchasing category, the user assigns a short job description and optionally defines additional job details such as skills and experience requirements. Job descriptions and details are displayed to the requester and are also communicated to the supplier.

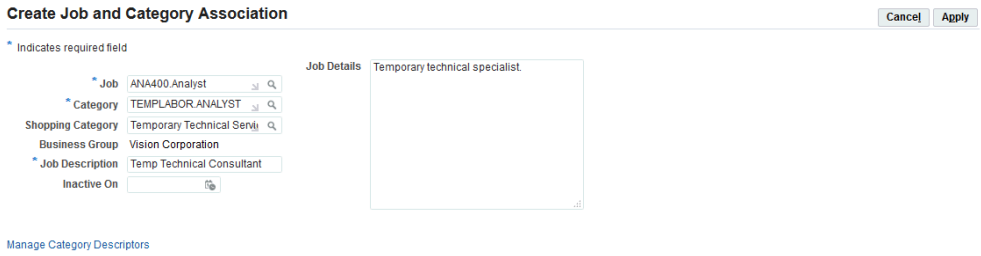
   Use the Associate Jobs with Categories page (Setup > Purchasing > Job Category Association) to associate a purchasing category set to an HR job.



4. Create Job and Shopping Category Association

   The Shopping Category field lists all the shopping categories defined for the business group. Though it is optional to specify a Shopping Category, if you select one, the application establishes an association between the Job – Purchasing Category – Shopping Category.

   The Manage Category Descriptors link is visible and active only if a shopping category is specified for the Job – Purchasing category combination.

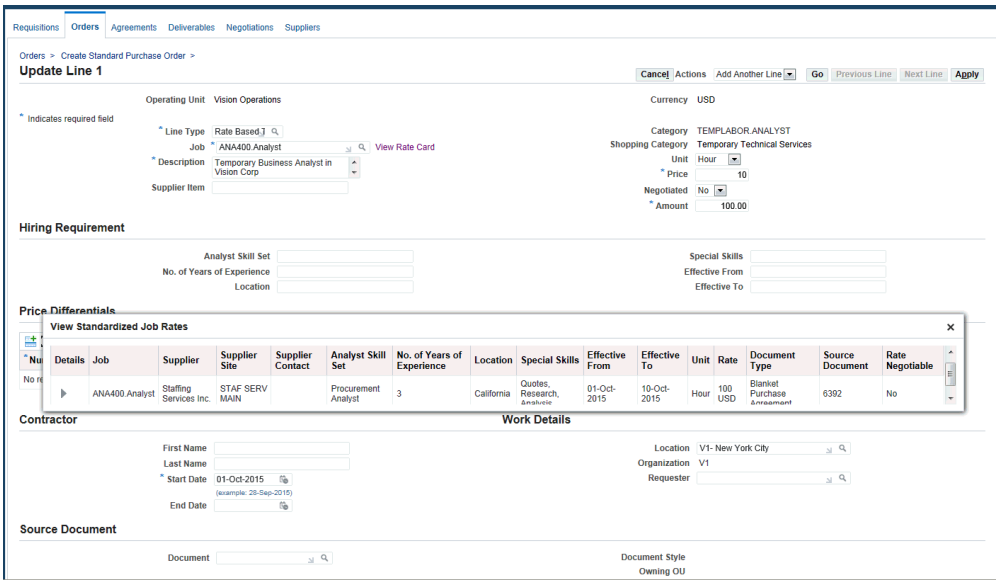


   Click the Manage Category Descriptors link to open the Manage Category Descriptors page. The Manage Descriptors page opens in Oracle iProcurement.

   For information on creating or updating job descriptors, refer to the *Setting Up Steps in Oracle iProcurement to Process the Procurement of Contingent Workers* topic.

   If buyers are negotiating offline with their suppliers, then create Standard Purchase Orders for rate based temp labor lines without any requisitions, agreements, sourcing events or other documents. The shopping category is defaulted in the Purchase Order line details page based on the selected job. Based on the Job – Purchasing Category – Shopping Category association, the descriptors get

displayed in the line details page. The View Rate Card link next to the Job field, when clicked, opens the rate card details popup for the selected job.



If Standard Purchase Orders are created from requisitions or as outcome documents of a Sourcing negotiation, then the descriptors and their values are copied from the source document and are displayed in the line details page.

The action View Rate Card from the line details page enables the buyer to view the supplier – site combination and the corresponding source document related details.

5. Define Profiles Options Related to Process the Procurement of Contingent Workers

   - PO: Contractor Assignment completion warning delay
   - PO: Amount Billed Threshold Percentage
   - POR: Contractor Expense Line Type
   - POR: Re-approval After Contractor Assignment
   - ICX: Days Needed By
   - POR: Default Currency Conversion Rate Type

   See: Profile Options Used in Oracle Services Procurement, page 2-3

6. Enable/Disable Price Differential Lookup Codes

   A pre-defined list of price differentials is seeded. Users may disable some price differentials or create additional price differentials. Price differentials are expressed as a multiplier of the base rate. For example if the normal/base rate for a software

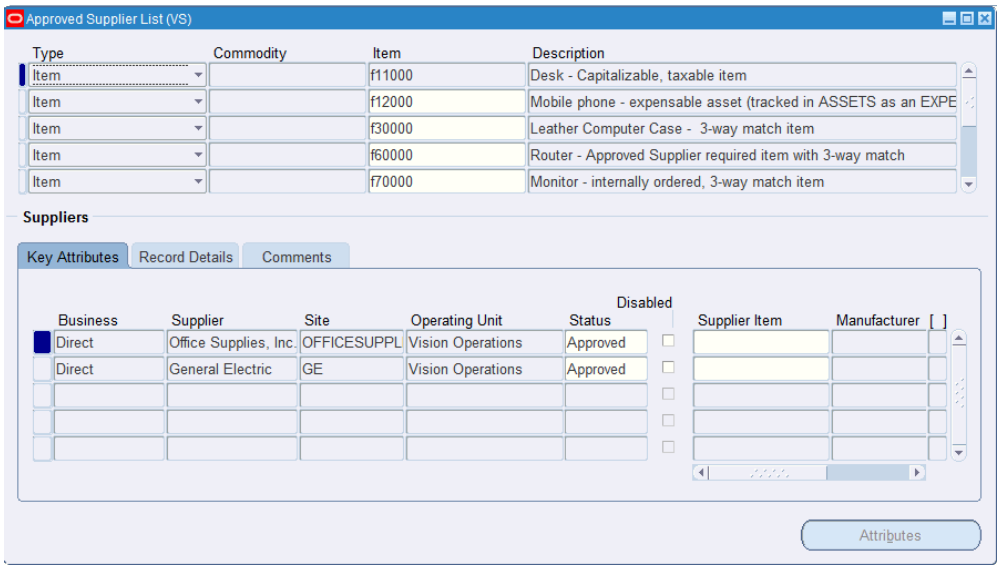
engineer is 60USD per hour and the overtime rate multiplier is 1.5, overtime is charged at 90USD per hour (60 * 1.5).

Use the Application Object Library Lookups window in the Application Developer responsibility to enable or disable the lookup codes for the PRICE DIFFERENTIALS for the lookup Type

7. Define an Approved Supplier List

   Using Define Approved Supplier List, the buyer optionally negotiates long-term service agreements in Oracle Sourcing.

   - Define one or multiple approved suppliers for each service category
   - Display approved suppliers during the contractor request flow



   Requests are released against the long-term service agreement using the pre-negotiated rates and terms. Approved suppliers are displayed to the requester during the requisition process. If a long-term agreement also exists for the supplier, the pre-negotiated rates are also displayed to the requester.

   Use the Approved Supplier List window (Supply Base > Approved Supplier List) in the Purchasing responsibility to define an approved supplier list.

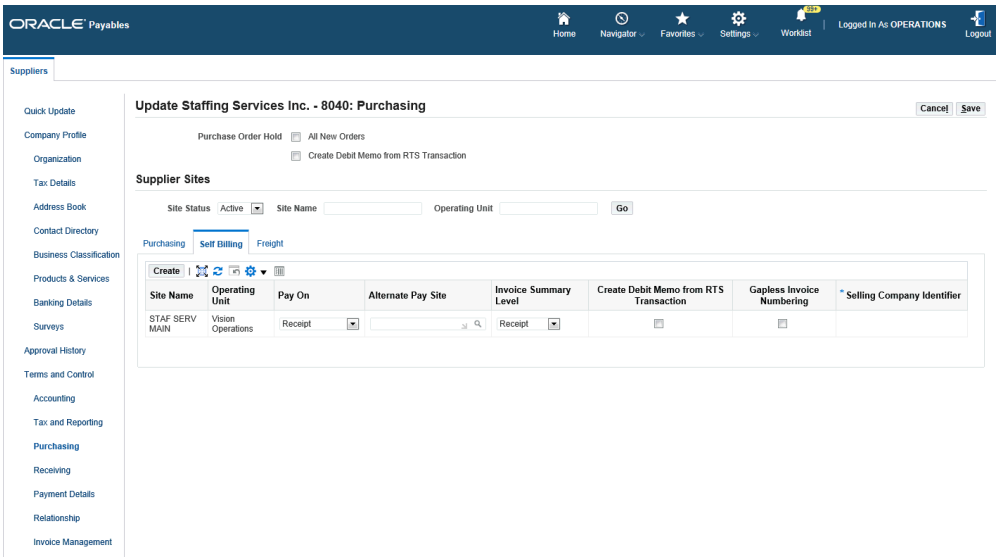
8. Enable Suppliers for Pay on Receipt

   Define suppliers and supplier information.

   Navigate to the Buyer Work Center > Suppliers tab to create supplier information. To create invoices automatically from service receipts, ensure the supplier is enabled for Payment on Receipt.

   Pay on receipt is enabled in the Supplier page, Purchasing section, Self Billing tab.

Set up supplier e-mail address for temporary labor suppliers. Provide an e-mail address for the Oracle iSupplier Portal user defined in the Users window for the supplier, supplier site, or supplier contact.



For more information, see the supplier registration information in the *Oracle iSupplier Portal Implementation Guide*.

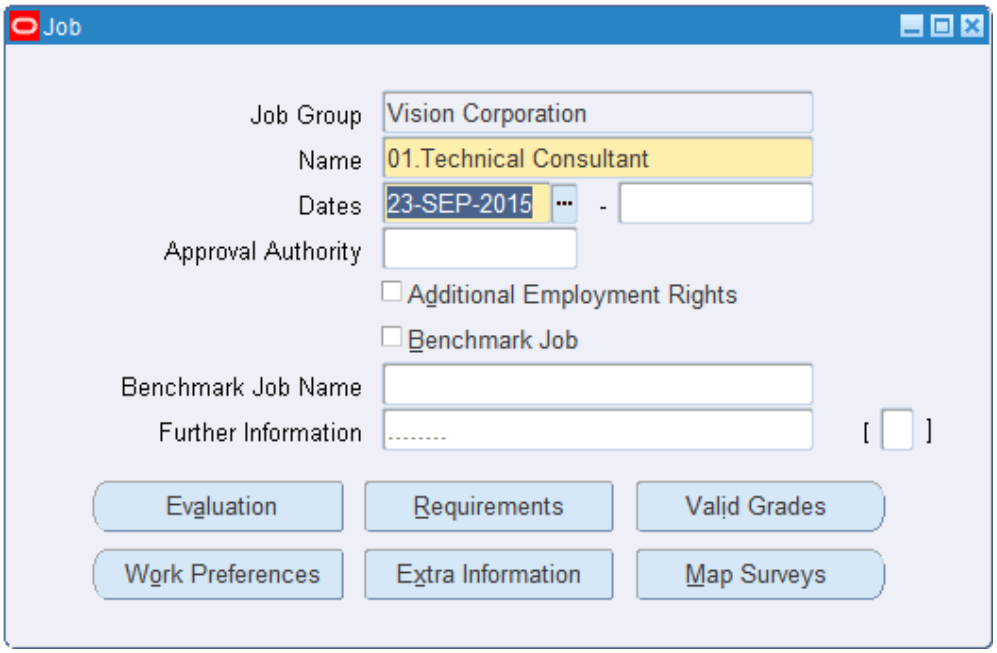
Setting Up Steps in Oracle Human Resources to Process the Procurement of Contingent Workers

This topic describes the set up steps in Oracle Human Resources to process the procurement of contingent workers.

A contingent worker is a non-employee people resource who works for the enterprise, and for whom the enterprise is responsible for their costs and expenses.

1. Create Jobs

   Oracle HRMS uses jobs to represent the duties people perform and the required skills. Define jobs for contingent workers based on your business requirements.



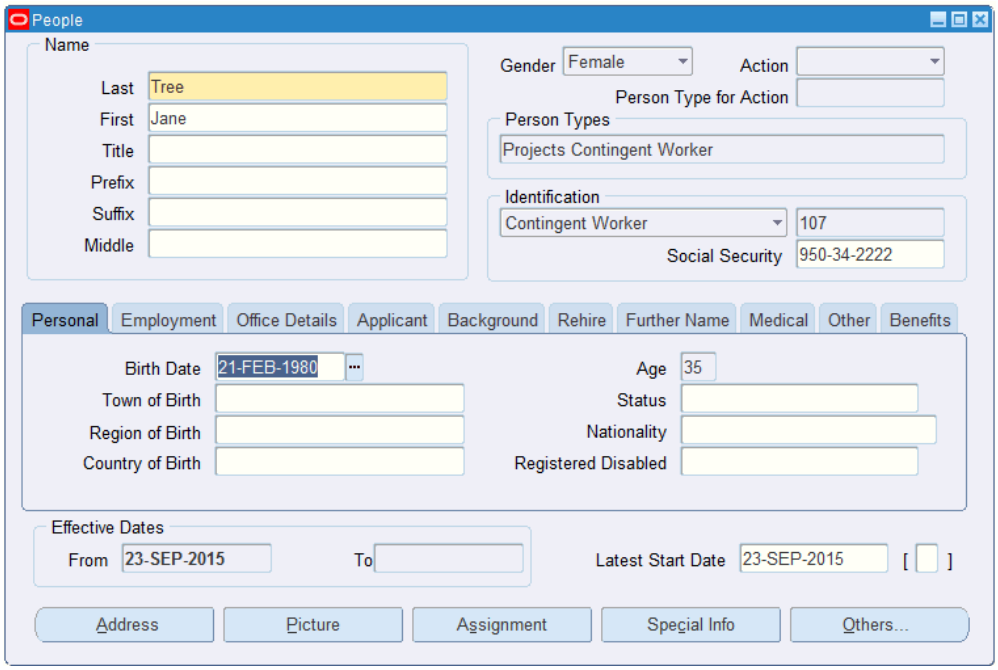
Only jobs that are assigned a purchasing category are procured or negotiated through Services Procurement is done in Purchasing. Use the Job window Work Structure > Job > Description in the Human Resource responsibility to create required jobs.

2. Create Contingent Workers

   In Oracle Human Resources, the HR person type 'Contingent Worker' enables you to track the following information for contingent workers:

   - Contingent worker assignment history
   - Periods of service
   - Breaks in assignments
   - Positions
   - Supervisors
   - Worker and supplier relationships

   Note: Select the 'Projects Contingent Worker' person type to associate the contingent worker to a project in Oracle Projects. This person type controls the timecard layout for the contingent worker. If you select Contingent Worker Type, your timecard layout will not include the Project information.



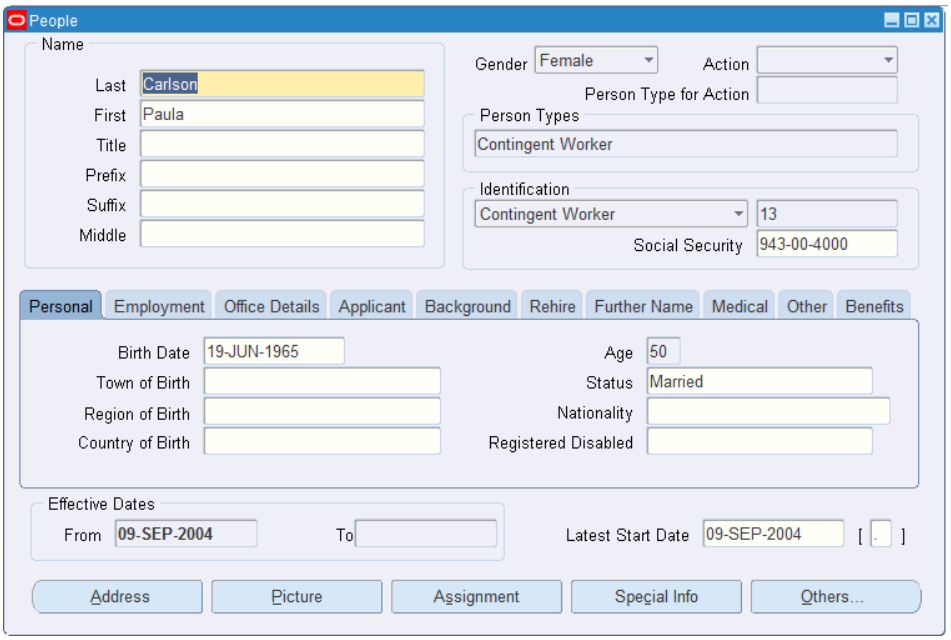
An HR personnel can use the following options to place contingent workers:

- Create a contingent worker record using the People and Assignment windows in Oracle Human Resources.

- Create a contingent worker record using the Contingent Worker Placement function in the Manager Self-Service responsibility. The HR user can place the contingent worker from a purchase order, Create Contractor Assignment link or directly navigate to the Contingent Worker Placement function from the Manager Self-Service responsibility.

- Create a Contingent Worker Using Oracle Human Resources

  Navigate to the People window (Enter and Maintain > New) to create a contingent worker with all details such as Last and First Name, Birth Date, Social Security No., Action Type and Latest Start Date.



Click the Assignment tab to navigate to the Assignment window and provide details such as the organization, job details, location, status, and supervisor name. You use the Supplier tabbed region to record information about the supplier providing the contingent worker to your enterprise. The procedure depends on whether you are using Oracle Services Procurement to provide purchase order information for contingent worker assignments.

Assignment(Tree, Jane)

Organization: Vision Services
Job: ANA400.Analyst
Grade:
Location: VS- Washington DC
Group:
Position:
Payroll:
Status: Active Contingent Assignment
Vacancy:
Assignment Number: 107
Assignment Category:
Collective Agreement:
Employee Category:

Supplier | Supervisor | Standard Conditions | Statutory Information | Miscellaneous | Project Information

Purchase Order Number: 3520
Supplier Name: Staffing Services Inc.
Supplier ID for Worker:
Purchase Order Line: 1
Supplier Site: STAF SERV PROJ
Supplier ID for Assignment:

Effective Dates
From: 23-SEP-2015
To:

Salary | Entries | Tax Info | Others...

Assignment(Tree, Jane)

Organization: Vision Services
Job: ANA400.Analyst
Grade:
Location: VS- Washington DC
Group:
Position:
Payroll:
Status: Active Contingent Assignment
Vacancy:
Assignment Number: 107
Assignment Category:
Collective Agreement:
Employee Category:

Supplier | Supervisor | Standard Conditions | Statutory Information | Miscellaneous | Project Information

Name: Baker, Catherine
Worker Number: 40
Assignment Number:

Effective Dates
From: 23-SEP-2015
To:

Salary | Entries | Tax Info | Others...

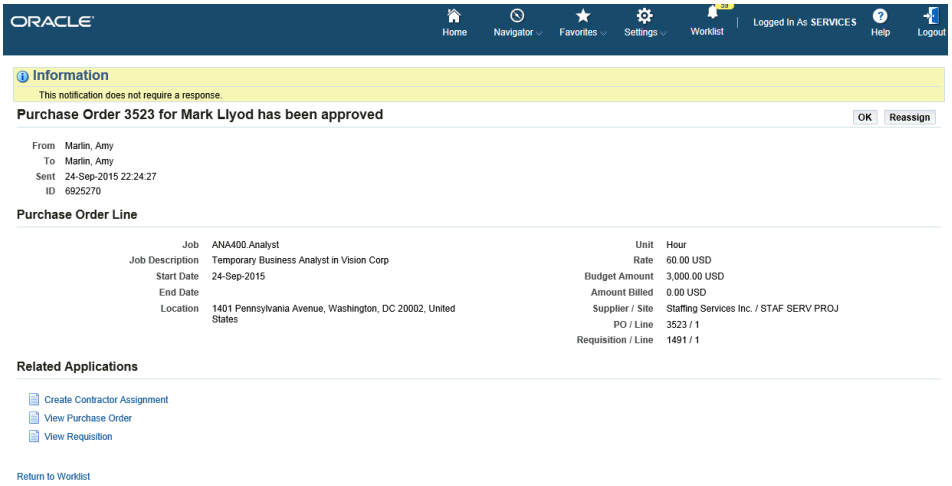
For more information on creating contingent workers using Oracle Human Resources, refer to the *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*.

- Create a Contingent Worker Using Oracle Self-Service Human Resources (Oracle SSHR)

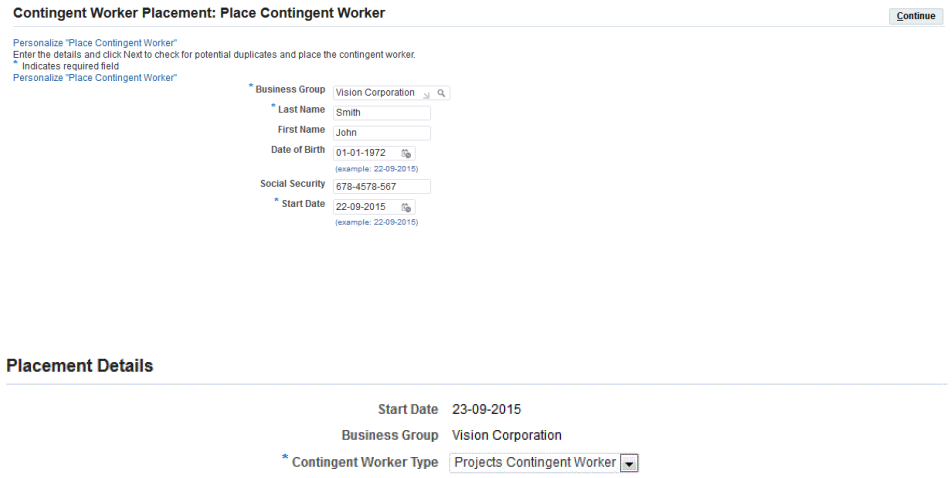
  An HR personnel can create a contingent worker record using the Contingent

Worker Placement function in the Manager Self-Service responsibility. The HR user can place the contingent worker from a purchase order, Create Contractor Assignment link or navigate directly to the Contingent Worker Placement function from the Manager Self-Service responsibility.

Use the Contingent Worker Placement pages to create contingent worker details.



In the Contingent Worker Placement pages, enter the details required to create the contingent worker record, such as the basic details, assignment status and supplier. If you navigate to this page directly from the purchase order notification, then the order details such as the purchase order number, line, and project details if any default to the page. Submit the placement record for approval after all the details.



Assignment Status

Status	Active Contingent Assignment
Change Reason	
Projected Assignment End	

Supplier

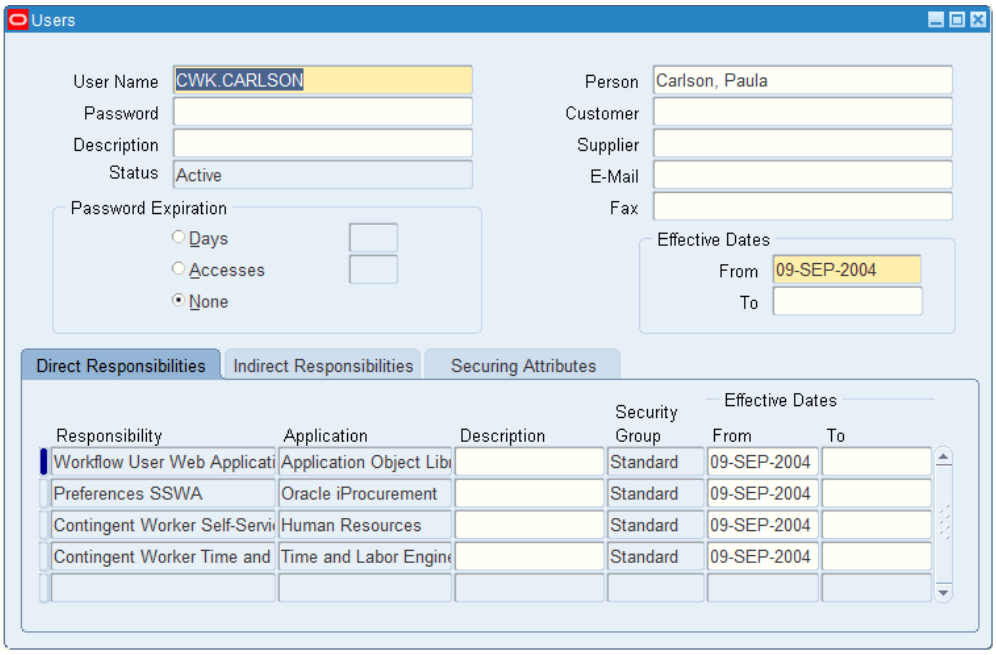
Purchase Order Number	3519
Purchase Order Line	1
Supplier Name	Staffing Services Inc.
Supplier Site	
Supplier ID for Worker	
Supplier ID for Assignment	

Depending on the approvals set in your enterprise, the placement is routed for approval.

For more information on using Oracle SSHR to place contingent workers, refer to the *Oracle Self-Service Human Resources Deploy Self-Service Capability Guide*.

3. Define Users for Contingent Workers

   After the placement of a contingent worker, create an user for the contingent worker user and assign responsibilities to the user using the Define window (Security > User) in the System Administrator responsibility.



Assign the Self Service Time and Labor responsibilities to the contingent worker user to create timecard entries. For example, assign:

- Contingent Worker Self-Service
- Contingent Worker Time and Expense
- Preferences SSWA

4. Link Multiple Purchase Orders to a Contingent Worker

   Oracle Services Procurement enables you to associate more than one purchase order or purchase order line to a contingent worker. If the task flow to use the PO_CWK_ASSOCIATIONS function is enabled, then you can use the Associate Purchase Order with Contingent Worker page to associate more than one purchase order or purchase order line to a contingent worker.

   Refer to the My Oracle Support document *Set up for Task Flow*: 1141005.1 to link multiple purchase orders with a contingent worker.

5. Set Up Profiles Options

   Oracle Services Procurement uses the following profile options in the procurement of contingent worker process:

   Set the following profile options:

   - MO: Operating Unit

- HR: Business Group
- HR: Security Profile
- HR: Expand Role of Contingent Worker
- HR: CWK in Head Count Reports
- HR: Use Global Contingent Worker Numbering
- HR: Contingent Worker Manager Actions Menu
- HR: Contingent Worker Personal Actions Menu

See: Profile Options Used in Oracle Services Procurement, page 2-3

Setting Up Steps in Oracle Time and Labor to Process the Procurement of Contingent Workers

This topic describes the set up steps in Oracle Time and Labor to process the procurement of contingent workers.

The following features in Oracle Time and Labor support the processing of contingent worker procurement:

- Single source of time entry
- Configurable timecard layouts for contingent workers
- Validation of time data from recipient applications

Oracle Time and Labor integrates with Oracle Services Procurement to provide visibility into Services Spending, controlling input of overtime and shift differentials of contingent workers, and validation of purchase orders against pre-authorized amounts.

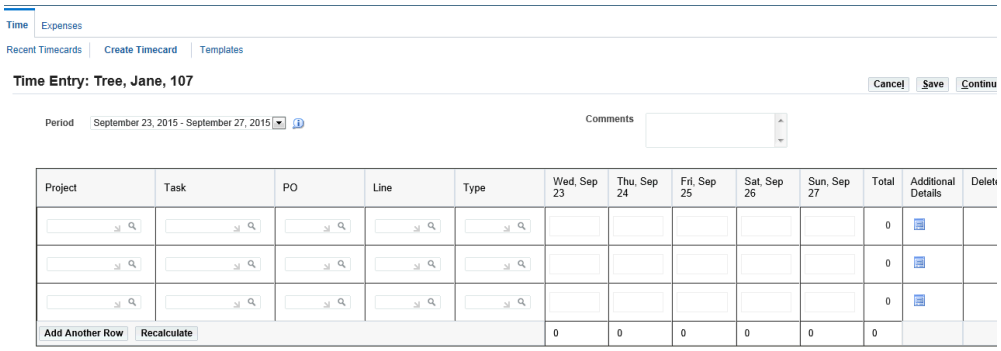
For more information about the steps in this topic, refer to the *Oracle Time and Labor Implementation and User Guide*.

1. Define Timecard Layouts for Contingent Worker Time Entries

   The OTL layouts for contingent workers support:

   - Association of time entries to purchase orders
   - Automation of timecard approval routings
   - Generation of purchase order receipts from approved timecards

   Workers use a self service web page in the format of a timecard for timecard entries.



Create different timecard layouts for each group of workers so that they only see the fields that are relevant to them.

There are five types of layouts: for data entry, review, confirmation, and detail (corresponding to the web pages in the Self Service workflow), plus a layout for exporting data for disconnected entry.

Following are the predefined OTL layout styles:

- Projects layout: Using this layout, workers enter their time against a selected project, task, and type. Workers click on a Details button to enter comments against each project, task, and type combination.

- Payroll Layout: Using this layout, workers enter a start and stop time, or a number of hours, for each day of the week for the selected hours type. This layout is suitable for workers who are submitting their time to Oracle HR or Payroll.

- Projects with Payroll Layout: This layout is similar to the Projects layout except that the list of values for the Type field comes from the alternate name you have assigned to the worker (using preferences) for the Expenditure Elements alternate name type. So when a worker selects a type for a time entry, an element name is also recorded in the time store.

- Work based Projects and Payroll Layout: Using this layout, workers enter their time against a selected project, task, task and cost code type, job, location, and work type. Workers click the Details button to enter comments against each project, task, and type combination.

- Exception Layout: This layout displays one row where the worker selects an hours type and cost center, then enter the number of hours for each day of the week. Use this layout for workers who only need to submit timecards for exception reporting (such as time absent for sickness or vacation).

Several layout styles are predefined. Use these as supplied, or copy and modify them. For example, modify a layout to remove a field that you do not use.

For instructions on modifying layouts, refer to the white papers available on My

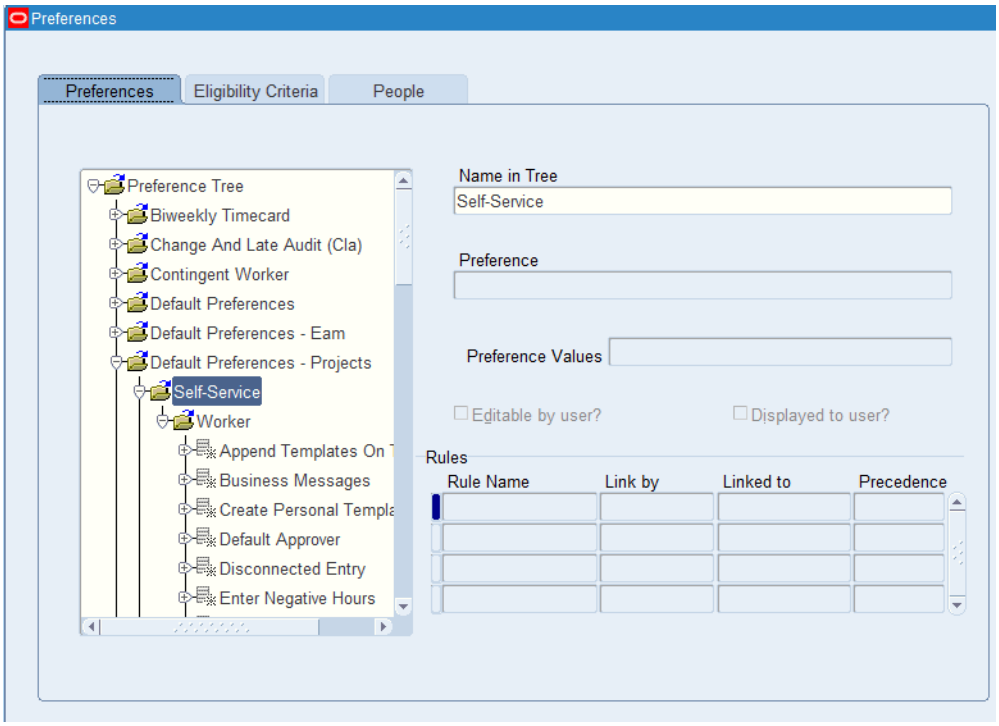
Oracle Support:

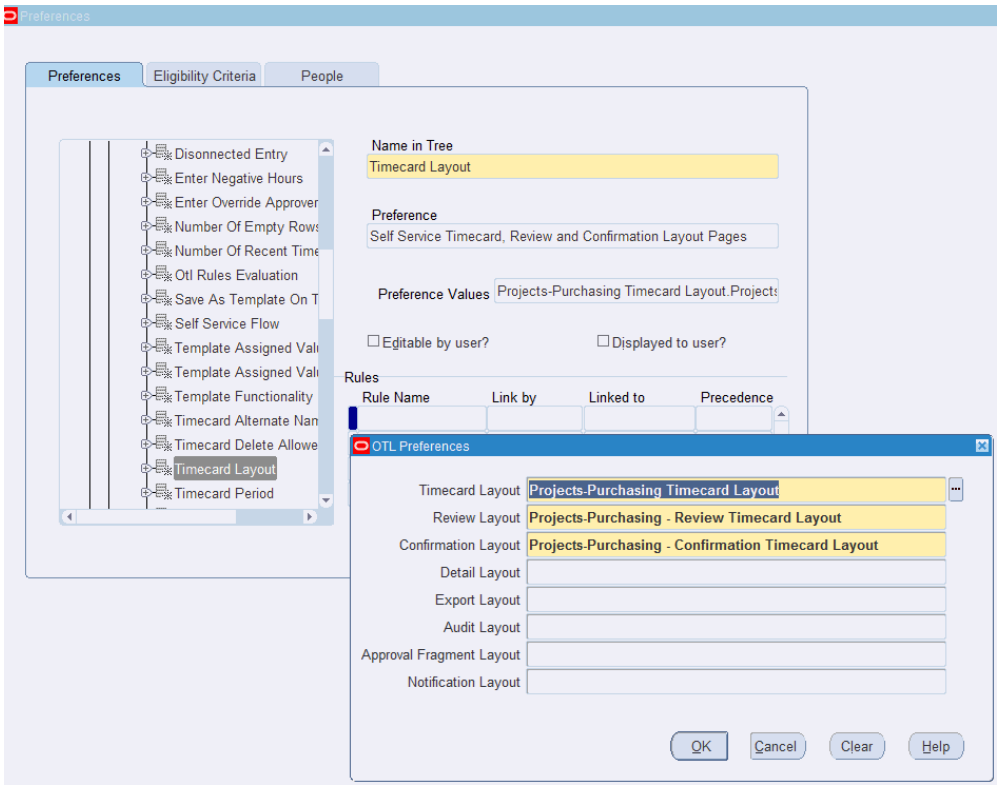
- *Oracle Time & Labor Timecard Configuration*, Note 304340.1
- *Timecard Audit Trail White Paper*: Note 842159.1

2. Set Up Preferences for Self-Service Timecard Entries

   Preferences enable you to define rules about how individual workers or groups of workers can use the application. There are rules for the time store, such as which set of applications can retrieve data about a worker's time, and rules about Self-Service timecard entry, such as whether the worker can enter a negative number of hours. Choose which preferences workers can see, and which ones they can edit.

   For time entries based on integration with Oracle Purchasing or Oracle Projects, define Preferences using the Preferences window in the OTL Application Developer responsibility.





Note: When you setup OTL- Oracle Projects integration, ensure that the OTL preference Project Payroll Integration is set in order to use the project timecard layouts intended for use with the HR rate source for labor costing. For more information on setting OTL preference, see Defining Preferences, Oracle Time and Labor Implementation and User Guide. For more information on using HR rates for labor costing, see: Using Rates for Costing, *Oracle Projects Fundamentals Guide*.

Setting Up Steps in Oracle Internet Expenses to Process the Procurement of Contingent Workers

Features in Oracle Internet Expenses support:

- Entry of expense reports on behalf of contingent workers
- Automated approval routings
- Payment to Supplier not the contingent worker
- Contingent worker expense processing

Buyers must have the Internet Expenses responsibility to create an expense report on behalf of the contingent workers. To use the contingent worker functionality in Internet Expenses, you must set up your contingent workers in Oracle HRMS.

For more information, see: *Oracle Internet Expenses Implementation and Administration Guide*.

Setting Up Steps in Oracle Projects to Process the Procurement of Contingent Workers

This topic describes the set up steps in Oracle Projects to process the procurement of contingent workers.

Oracle Projects enables you to define and utilize contingent workers on projects in the same capacities and manner as employees. Define requirements and perform searches for contingent worker candidates, and directly assign contingent workers to projects and tasks.

Contingent workers can enter timecards via preapproved batches or Oracle Time and Labor. You can set up Oracle Projects to calculate contingent worker labor costs based on the rates defined in the purchase orders you create to procure contingent worker services.

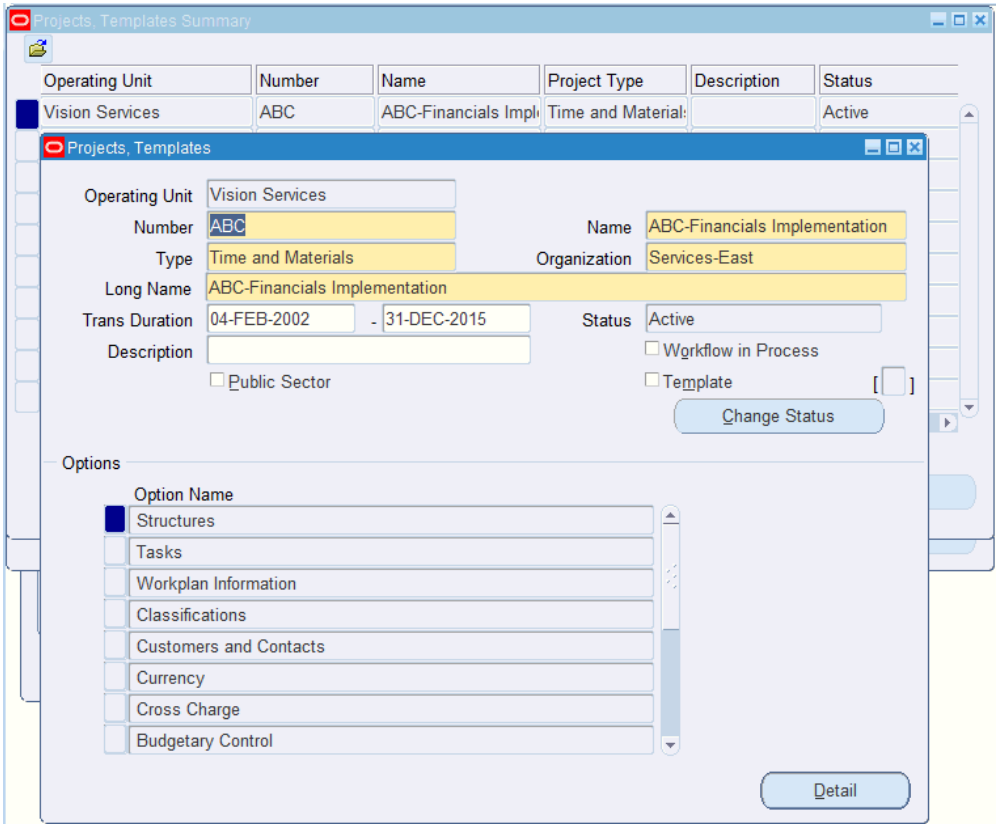
To facilitate processing of contingent worker expenses, you can optionally allow contingent workers to enter their expenses directly in Oracle Internet Expenses, or via Microsoft Excel expense entry and preapproved batches in Oracle Projects. You can also require the enterprise responsible for providing contingent worker services to invoice you for these expense costs and process the expense invoices in Oracle Payables.

To distinguish contingent worker labor and expense costs from employee costs, you can define AutoAccounting rules to separately account for contingent worker costs. As with other project costs, you can view the details of contingent worker labor and expense costs via Expenditure Inquiry, Project Status Inquiry, Project Performance Reporting, and in Discoverer workbooks. For more information about the setup steps in this section, refer to the *Oracle Projects Implementation Guide and Oracle Projects Fundamentals*.

To integrate Services Procurement contingent worker flow with Oracle Projects, complete the following steps:

1. Create Projects

   Create projects (Projects > Projects Definition > Projects) using an appropriate Projects responsibility. Define the project with details of the Project Name, Number, Expenditure Type, Task and other project related details.

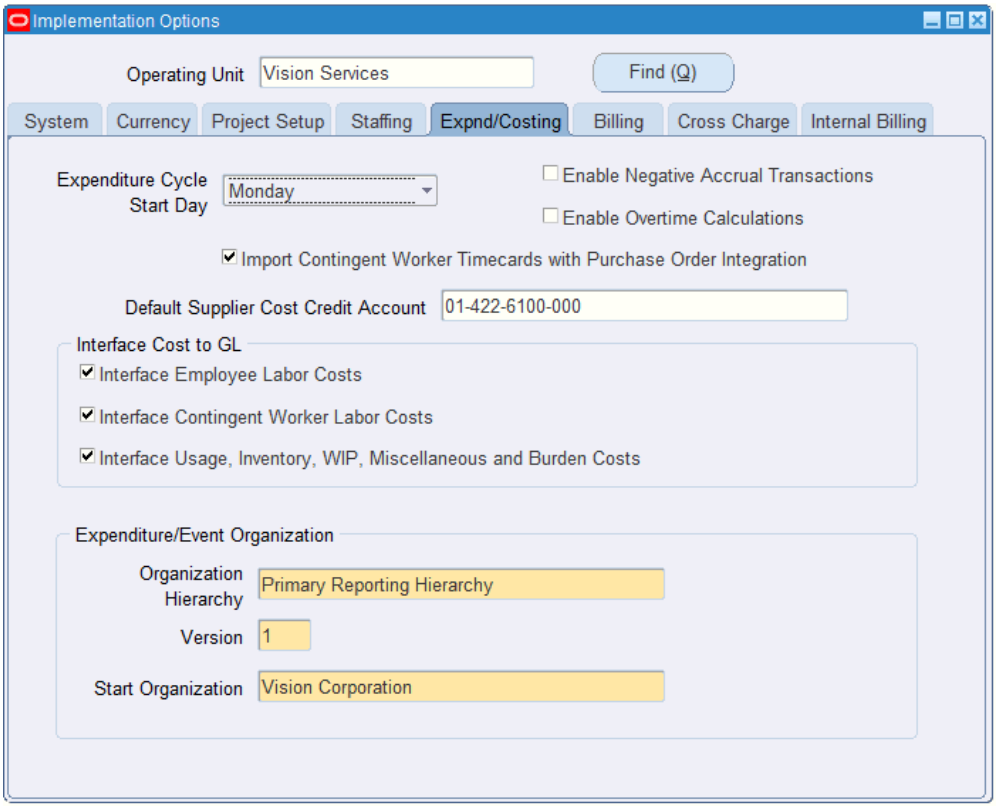


2. Set Up Purchase Order Integration with Oracle Projects

   Import Contingent Worker Timecards with Purchase Order Integration: Enable this option if you want to import contingent worker labor costs from timecards. When you select this option, contingent workers can select a purchase order when they enter timecards. Specifying a contingent worker purchase order on a timecard allows the labor cost to be imported via the timecard, and prevents interface of labor costs to Oracle Projects from supplier invoices that are associated with the purchase order.

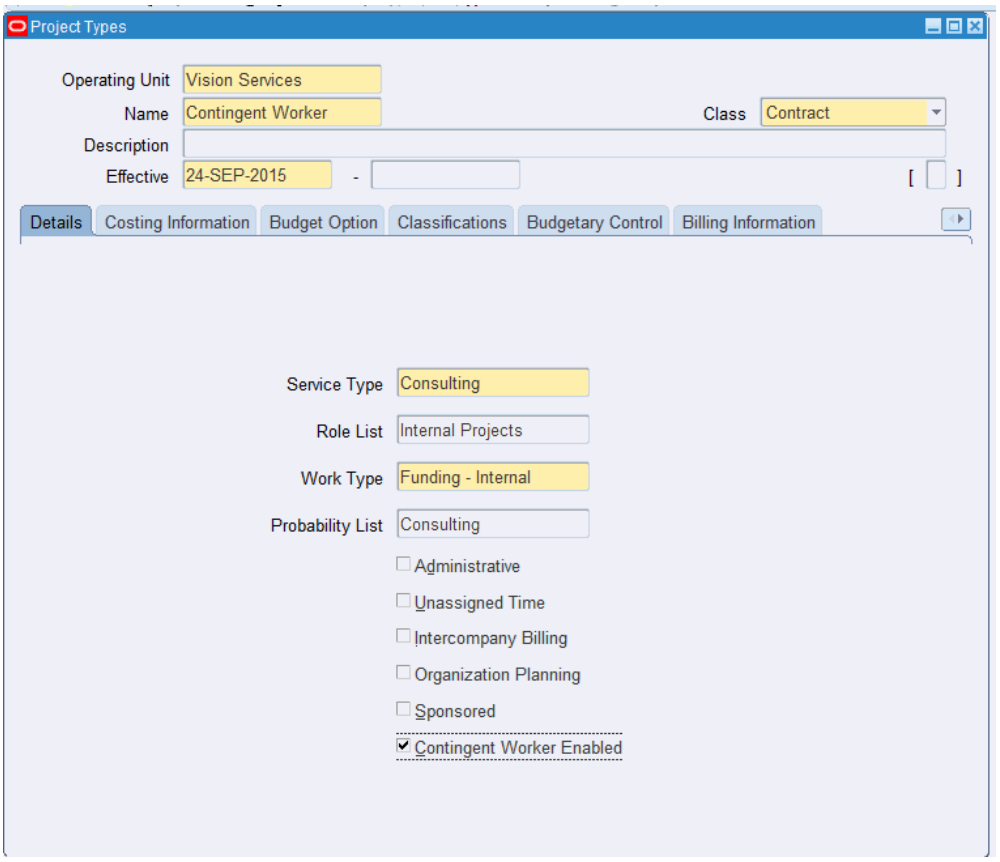
   To enable this option, navigate to the Implementation Options window (Accounting > Setup > System).

   Click the Expand/Costing tab and select the check box Import Contingent Worker Timecards with Purchase Order Integration.



3. Enable Contingent Workers for Project Types

   In the Project Types (Set Up > Project > Project Types) window, Enable the 'Contingent Worker Enabled' check box to include all purchase orders associated with contingent worker enabled projects available for selection when a contingent worker enters a timecard. If you do not enable this, only purchase orders associated with the project that the contingent worker entered on the timecard, are available for selection.



4. Define Oracle Projects Profile Options

   The following Oracle Projects profile options affect the procurement of contingent worker business flow.

   - PA: Allow Time Entry of Negative Hours
   - PA: AutoApprove Timesheets
   - PA: Enable Business Messages on Time Entry
   - PA: Override Approver

   See: Profile Options Used in Oracle Services Procurement, page 2-3

5. Set Up Auto Accounting to Process the Procurement of Contingent Workers

   Use the Assign AutoAccounting Rules in the Projects responsibility. Contingent Worker Labor is the function transaction the supports the contingent worker cost accounting in the the Labor Cost Clearing Account function.

Assign AutoAccounting Rules

Function

Name: Labor Cost Clearing Account Operating Unit: Vision Services Find

Description: Determines clearing account for labor costs

Function Transactions

Name	Description	Enabled
All Labor	Clearing account for all labor costs	☑
Contingent Worker Labor	Clearing account for contingent worker labor costs	☐
Employee Labor	Clearing account for employee labor costs	☐
		☐
		☐

Segment Rule Pairings

Number	Segment Name	Rule Name
0	Services Company	Company Default Rule
1	Services Department	Department Default Rule
2	Services Account	Labor Clearing Account Rule
3	Services Product	Product Default Rule

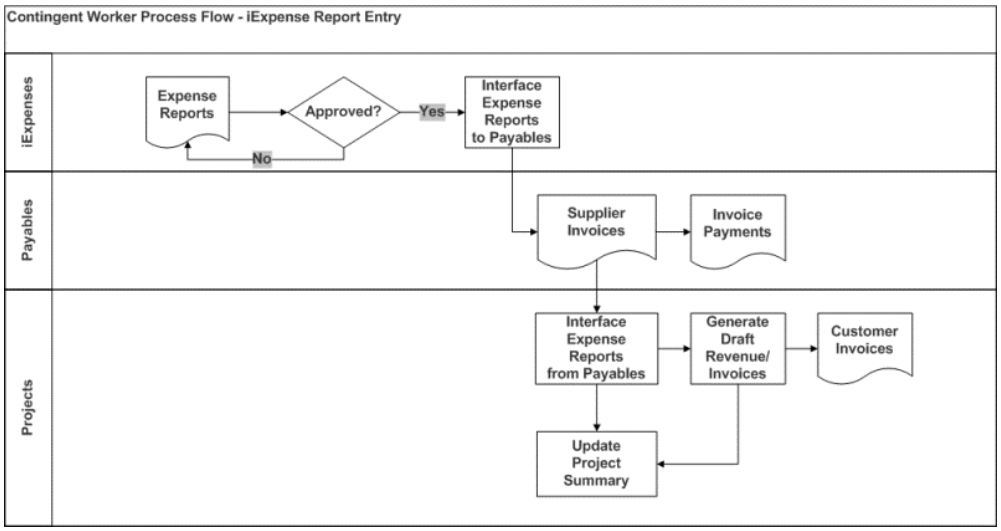
Rule

For more information on setting up the AutoAccounting feature to process the procurement of contingent workers, refer to *Oracle Projects Fundamentals*.

6. Implement Oracle Projects, Oracle Internet Expenses, and Oracle Payables Integration

   Implement Oracle Projects, Oracle Internet Expenses, and Oracle Payables integration to enable project-related expense report entry in Oracle Internet Expenses. For information, refer to the *Oracle Projects Implementation Guide*.

   The following flow diagram provides an overview of expense reporting in Oracle iExpenses to generate invoices in Oracle Projects.


Contingent Worker Process Flow - iExpense Report Entry
iExpenses
Payables
Projects
Expense Reports
Approved?
Yes
No
Interface Expense Reports to Payables
Supplier Invoices
Invoice Payments
Interface Expense Reports from Payables
Generate Draft Revenue/ Invoices
Customer Invoices
Update Project Summary

3

Processing Complex Work

This chapter covers the following topics:

- Understanding the Complex Work Features
- Overview of Processing Complex Work Procurement
- Creating Requisitions for Complex Work
- Creating Vendor Questionnaires for Complex Work
- Processing Approved Requisitions for Complex Work
- Creating Sourcing RFQs for Complex Work
- Creating Quotes
- Comparing and Analyzing Complex Work RFQs
- Awarding Complex Work RFQs
- Processing Complex Work Orders Created from RFQs
- Reviewing the Project Status of a Complex Work Order
- Viewing the Complex Work Purchase Order as a Supplier
- Creating an Invoice and Payment for Advance
- Tracking Advance Payments as a Supplier
- Using Work Confirmations (Complex-Work Purchase Orders only)
- Processing and Approving Work Confirmations for Complex Work Orders
- Transferring the Invoice Details of a Complex Work Order to Oracle Projects
- Tracking the Progress of a Project
- Releasing the Retained Amount
- Processing Deductions and Back Charges
- Processing Change Management and Requests
- Processing Change Management and Orders

- Reporting Analytics for a Project

Understanding the Complex Work Features

Complex services can include consulting, advertising, construction, research and development, and professional services, and they typically require negotiated contracts with complex terms and payment arrangements.

Complex work procurement spans across Oracle iProcurement, Oracle iSupplier Portal, Oracle Purchasing, Oracle Projects, Oracle Procurement Contracts, Oracle Sourcing, and Oracle Accounts Payable.

The following sections discuss key complex work features:

Incorporate Payment Schedule into a Contract

With Oracle's Complex Work feature, buying organizations can negotiate with their contractors on the progress payment schedule using the Sourcing RFQ and Quote process. When negotiations are complete, the buyer can autocreate the Contract from the sourcing document and incorporate a detailed progress payment schedule as part of the contract. The schedule consists of 'pay items' that specifies the work component, the associated dollar amount and due date for completion. The feature provides for maximum flexibility in defining these pay items based on the way progress needs to be measured. The pay items could be:

- Milestone:

  This pay item is based on a 'Milestone' that needs to be fully complete before the associated payment is claimed by the contractor. Example: Final Acceptance of Completed Freeway. Amount: $300,000.00. There are two kinds of Milestone pay items - Recurring Milestones and Non-Recurring Milestones.

  - Recurring Milestones can only be used with Line Types which have a value basis of Quantity. Consider the example of procurement of a complex item such as an F16 Aircraft. The Recurring Milestone represents an event such as 'Complete & Install Landing Gear' that needs to be completed for the product or service ordered. Hence, these recurring Milestones have a quantity associated with them which is the same as the line quantity. In this example, each F16 Aircraft will need Landing Gear and so if 10 Aircraft are being purchased, Landing Gears need to be installed for all 10 Aircraft.

  - Non-recurring Milestones are used with Fixed Price Services and Fixed Price Temp Labor Lines for procurement of a service such as 'Remodeling the Conference Room'. The Milestone represents an event such as 'Tear Down of the Existing Conference Room' that must be completed as a part of the service. This type of Milestone does not recur and needs to be completed just once.

- Rate:

This pay item is based on a 'Rate' of work completion. Payments for these are claimed as units of work are completed. Example: Installation of 200 lamp posts @ $1000.00/lamp post

- Lumpsum:

  This pay item is based on a 'Lump Sum' amount allocated to a portion of work against which payments are released based on the stage of completion. Unlike 'Milestone' pay items, contractors can report partial progress against 'Lump Sum' pay items and request payments. Example: Excavation of Site. Amount: $200,000.00.

The types of pay items that are used on the Contract depend on the PO Line the pay items are associated with. The following Lines Types are supported with this feature:

- Goods: With this Line Type, only Milestone Pay Items can be used.
- Fixed Price Services: With this Line Type, all three pay items can be used – Rate, Lumpsum and Milestone
- Fixed Price Temp Labor: Again, all three pay items can be used – Rate, Lumpsum and Milestone.

Note: Rate Based Temp Labor, Amount-based Services and Outside Processing Line Types are not supported with this feature.

Progress Payments are treated as either Delivery payments, that is payment for actual work done or progress made on the Contract, or treated as a form of Contract Financing as is typical in certain industries. The type of progress payments is decided on the Document Style by the status of the flag 'Treat Progress Payments as Financing'. When progress payments are considered a form of contract financing, these payments are automatically recouped from payments due at delivery based on the recoupment rates specified in the contract. For more details about the recoupment functionality please refer to the *Oracle Payables User Guide*.

Advances and Recoupment

To provide working capital to smaller contractors, buying organizations often pay advances to these contractors right after contract signing, before any work or product delivery has been performed.

Buying organizations can negotiate and finalize the terms of such advances, and ensure compliance to those terms. To define an Advance on the contract, the Document Style for the Contract should allow the use of Advances. Advances are defined on the PO Line as an amount and claimed by the contractor using Prepayment Invoices before any work has been done on the Contract. The contractor creates and submits these Prepayment Invoices through the Oracle iSupplier Portal. Requests for advances submitted by the contractor are verified against the advance limits set forth in the contract. These advance payments are automatically recouped from progress invoices, based on the recoupment rates specified in the contract.

Recoupment is the process of recovering previous financing payments from a current delivery payment billed on a Standard Invoice. All Financing Payments made to the contractor need to be liquidated or 'recouped'.

The Recoupment Rate attribute appears on the PO Line if the Document Style either enables the use of Advances or the 'Treat Progress Payments as Financing' flag is enabled. The buyer can then define a Recoupment Rate on the PO Line, which will be applied to Standard Invoices billed to the Line or Pay Items of the Contract for deliveries made by the Contractor.

The Progress Payment Rate is used primarily on Cost Reimbursement Contracts and represents the rate at which costs incurred by the Contractor can be reimbursed by the buying organization. This term is captured on the Contract for offline use by the Contractor in determining the billable amount for work done on the Contract. It is not used for any computation on the Contract or any of its transaction documents like Work Confirmations or Invoices. The Progress Payment Rate attribute appears on the PO Line if the Document Styles has the flag 'Treat Progress Payments as Financing' enabled.

Track Progress Based on a Schedule

Oracle's Complex Work feature provides a streamlined process for Contractors to report progress and request payments using either a Work Confirmation Request or an Invoice, each of which can then be electronically routed for approval.

The feature allows online negotiation on the amount of work eligible for payment through multiple rounds of resubmissions of the work confirmation request till both parties are in agreement and the request is approved. The contractor can report progress and request progress payments in the multiple ways.

Release Progress Payments

The Contractor can request payment for the work that has been completed on the Progress Payment Schedule. These payments are billed using a Standard Invoice and are used to recoup Contract Financing based on the Recoupment Rate specified on the Contract. Also Retainage is applied to these Progress Payments.

Contract Financing

In certain industries, Progress Payments are treated as a form of Contract Financing. This is configured on the Document Style using the flag 'Treat Progress Payments as Financing'. As work progresses, Contract Financing is released by the buying organization. These Progress Payments are billed using a Prepayment Invoice and are tracked on the Contract as an Amount Financed on the respective Pay Item and its Distribution. No retainage can be applied to these progress payments. At the completion of the Contract, a final Standard Invoice is submitted by the Contractor for the delivery of goods and services specified on the contract. The buying organization can process this final Invoice for payment and recoup all previously released Contract Financing. Progress payments are released using methods such as Self-Billing and

Contractor Submits an Invoice.

Self-Billing (Evaluated Receipt Settlement)

The buying organization can use Evaluated Receipt Settlement to create Invoices from processed Work Confirmations. If the Contract and the Supplier Site are setup with the Pay on Receipt flag set to 'Receipt', then the Pay on Receipt AutoInvoice Program can generate Invoices for both Contract Financing as well as Delivery Payments automatically.

Retainage and Retainage Release

Retainage represents funds withheld from payment to ensure that the contractor finishes work as agreed. The buying organization releases these funds only after verifying that the contractor has fulfilled all contractual obligations. Retainage is also called 'retention' or 'contractual withholds'. Contract administrator can negotiate retainage terms with the contractor and capture these as part of the contract. These terms include Retainage Rate and Maximum Retainage Amount.

Retainage Rate

The Retainage Rate determines the percentage of the amount requested that will be withheld before releasing payments to the contractor. This attribute appears on the PO Line if the Document Styles enables the use of Retainage. The Retainage Rate specified on the PO Line is applied to all Standard Invoices billed to the Pay Items of the respective Line. Based on the Retainage Rate, a certain percentage of the Standard Invoice Amount is with-held as a Retained Amount.

Maximum Retainage Amount

The Maximum Retainage Amount defines the maximum amount of Retainage that is withheld on a Contract Line. The Maximum Retainage Amount attribute appears on the PO Line if the Document Style enables the use of Retainage. Every time Retainage is withheld on an Invoice, the application checks that the total retained amount does not exceed this value.

Retainage Release

At the end of the project the contractor can submit a Retainage Release Invoice for release of retainage withheld on the Contract. If the contractual clauses or other conditions governing the release of the retainage are met, the buyer can release the retainage amount applicable. Retainage Release Invoices can also be used for recoupment of financing payments.

- The application will not allow you to release more than the retained amount.

- You cannot Finally Close a contract that has an outstanding retainage balance.

Refer to the *Oracle Payables User Guide* for more information on the Invoicing features.

Overview of Processing Complex Work Procurement

This topic provides an overview of the tasks in the processing of complex work procurement. Since complex work procurement processing requires integration between several Oracle Applications, the following table lists the sequence of tasks, Oracle Application to perform the task, and the functional user who performs the task.

Sequence No.	Task	Oracle Application	Typical Functional User
1	Creating Requisitions for Complex Work	Oracle iProcurement	Project manager/Requester
2	Creating Vendor Questionnaires for Complex Work	Oracle Sourcing	Sourcing buyer/Contract administrator
3	Processing Approved Requisitions for Complex Work	Oracle Purchasing	Buyer
4	Creating Sourcing RFQs for Complex Work	Oracle Sourcing	Sourcing buyer/Contract Administrator
5	Creating Quotes	Oracle iSupplier Portal	Supplier
6	Comparing and Analyzing Complex Work RFQs	Oracle Sourcing	Sourcing buyer/Contract Administrator
7	Awarding Complex Work RFQs	Oracle Sourcing	Sourcing buyer/Contract Administrator
8	Processing Complex Work Orders Created from RFQs	Oracle Services Procurement	Buyer

Sequence No.	Task	Oracle Application	Typical Functional User
9	Reviewing the Project Status of a Complex Work Order	Oracle Projects	Project manager
10	Viewing the Complex Work Purchase Order as a Supplier	Oracle iSupplier Portal	Supplier
11	Creating an Invoice and Payment for Advance	Oracle Payables	Payables administrator
12	Tracking Advance Payments as a Supplier	Oracle iSupplier Portal	Supplier
13	Creating a Work Confirmation for a Complex Work Order	Oracle Services Procurement	Project manager /Supplier
14	Processing and Approving Work Confirmations for Complex Work Orders	Oracle Services Procurement	Buyer
15	Transferring the Invoice Details of a Complex Work Order to Oracle Projects	Oracle Projects	Project manager
16	Tracking the Progress of a Project	Oracle Projects	Project manager/ Payables administrator
17	Releasing the Retained Amount	Oracle Payables	Project manager
18	Processing Deductions and Back Charges	Oracle Projects	Project manager
19	Processing Change Management and Requests	Oracle Projects	Project manager

Sequence No.	Task	Oracle Application	Typical Functional User
20	Processing Change Management and Orders	Oracle Projects	Project manager
21	Reporting Analytics for a Project	Oracle Projects	Project manager

Creating Requisitions for Complex Work

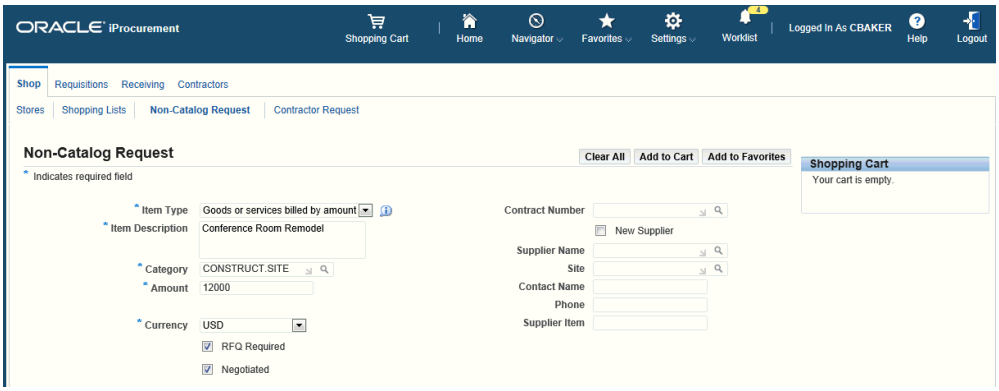
Oracle iProcurement provides the Contractor Request content zone for use by Oracle Services Procurement. As a project manager, use Oracle iProcurement to create requisitions for complex work. Oracle iProcurement requisitions fixed price services using a non-catalog request.

To create a requisition for complex work:

1. Log in to the iProcurement responsibility.

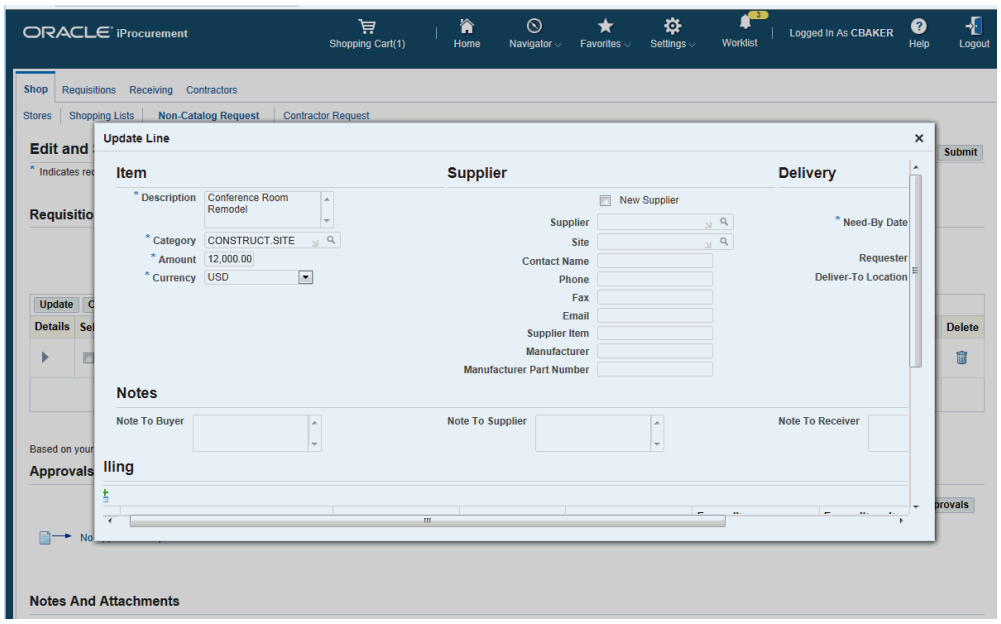
2. In the Shop tab, click the Non-Catalog Request subtab to create the requisition for complex work.

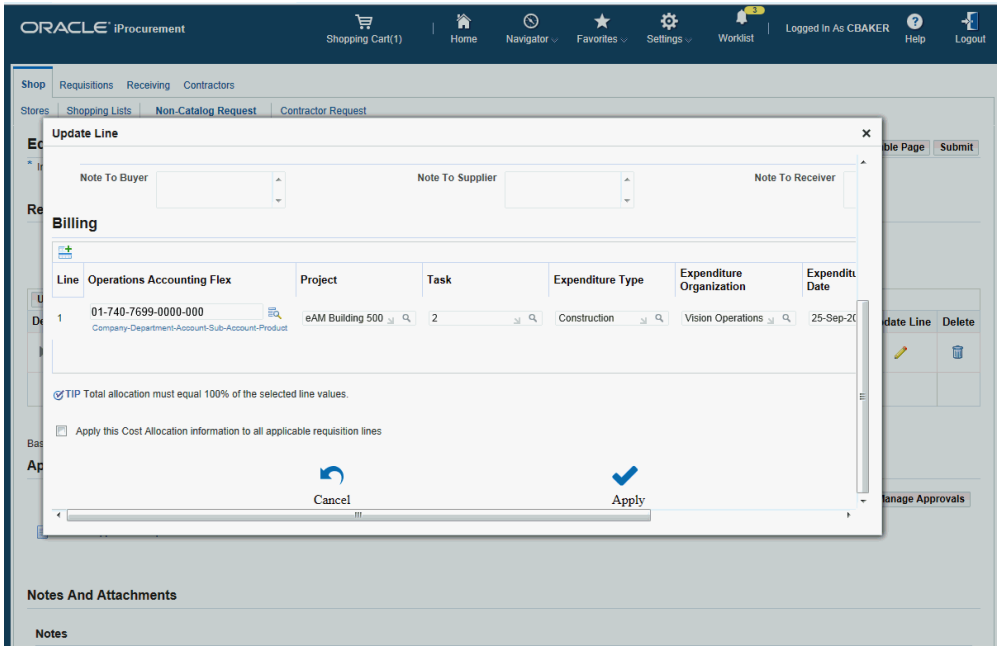
3. In the Non-Catalog Request page, provide the details required for your requisition. **Note**: The Item Type field is used to select Goods or services billed by amount, which uses the line type selected in the POR: Amount Based Services Line Type profile option. The Services billed by quantity item type corresponds to the line type selected in the POR: Rate Based Services Line Type profile option.



4. Click Add to Cart and then View Cart and Checkout.

5. Click Checkout.





6. Complete the following sections:

- Billing: Enter the Project, Task, Expenditure Type, Expenditure Organization and Expenditure Date on the requisition, which is required for the project.

- Project Number: If your organization uses Oracle Projects and your purchases

normally belong to a specific project, enter that number here.

- Task Number: If your organization uses Oracle Projects and your purchases normally belong to a specific task, enter that number here.
- Expenditure Type: If your organization uses Oracle Grants and your purchases normally belong to a specific expenditure type, enter that number here.
- Expenditure Org: If your organization uses Oracle Grants and your purchases normally belong to a specific organization, enter that number here.
- Expenditure Item Date: If your organization uses Oracle Grants and your purchases normally belong to a specific item date, enter that number here. This is the number of days after the order date that you want your expenditure item date in the Billing details to default to during checkout.
- In the Delivery section, you can accept the defaults or update the required details based on the requisition.

7. Review the requisition information and submit the requisition for approval. The approval of the requisition depending on the approval rules set in your enterprise.

   For more information on creating requisitions, refer to the *Oracle iProcurement Implementation and Administration Guide*.

Creating Vendor Questionnaires for Complex Work

After a project manager creates a requisition for complex work, the sourcing buyer identifies those suppliers with the technical capability to undertake a complex work. The buying company sends a vendor questionnaire to the identified suppliers to check if the suppliers conform to the pre-qualification criteria. The vendor questionnaires are RFIs that a sourcing user creates in Oracle Sourcing.

Use RFI's ((Request for Information) to:

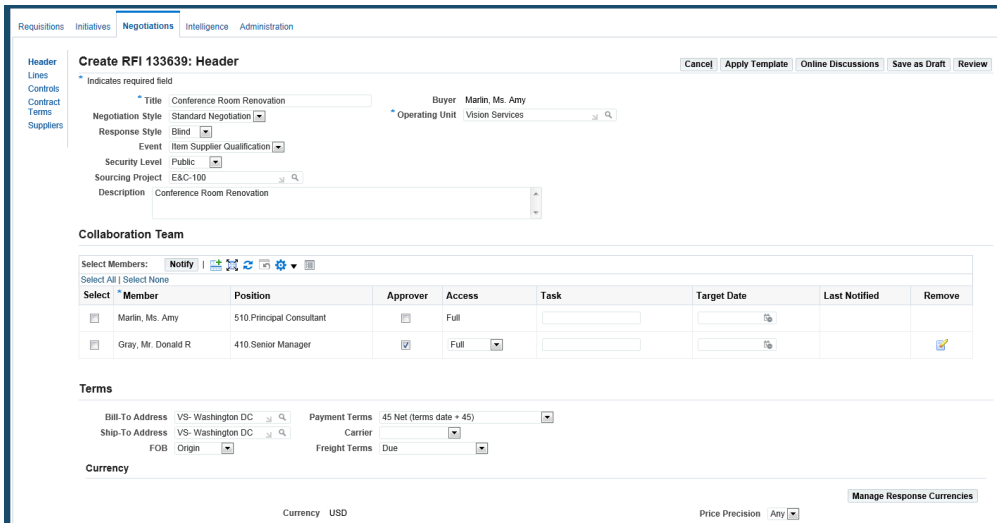
- Gather information on goods and service provided by a supplier.
- Qualify suppliers and their goods and services for subsequent procurement activities.

To create a RFI for complex work:

1. Log in to the Sourcing Super User responsibility.
2. In the Sourcing home page, Quick Links, Create section, click RFI. The Create RFI page appears.

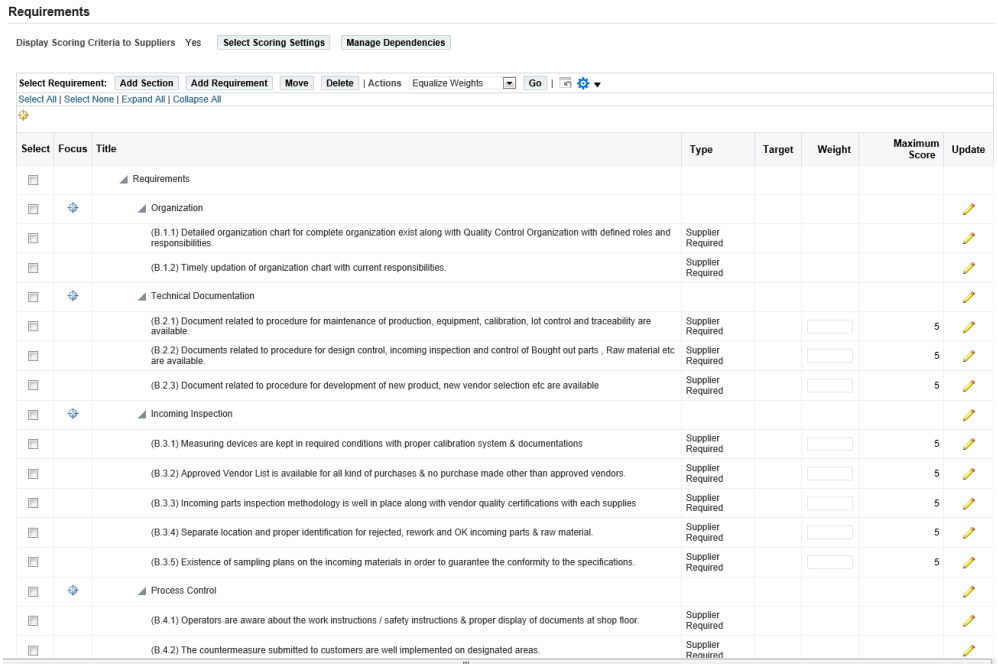
3. Based on the requirement of your complex work, complete the following for the RFI:

   - Header details
   - Lines details
   - Controls details
   - Contract Terms details
   - Suppliers details

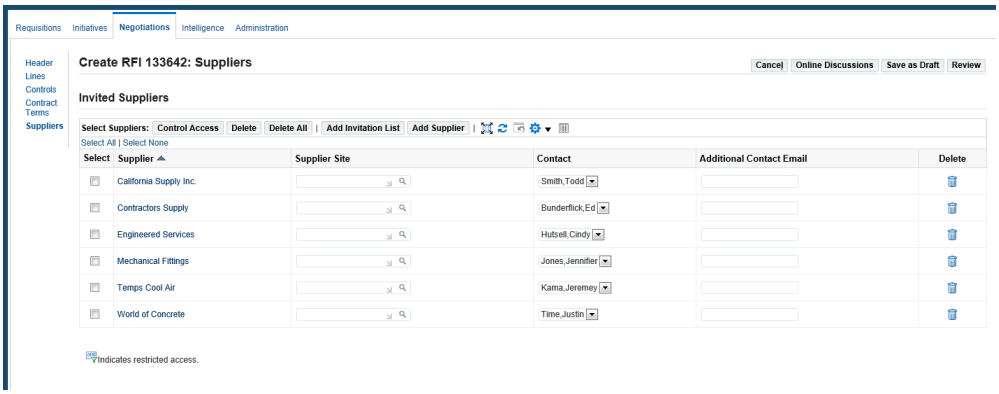


4. Use the Collaboration Team section to decide on the supplier qualification process.

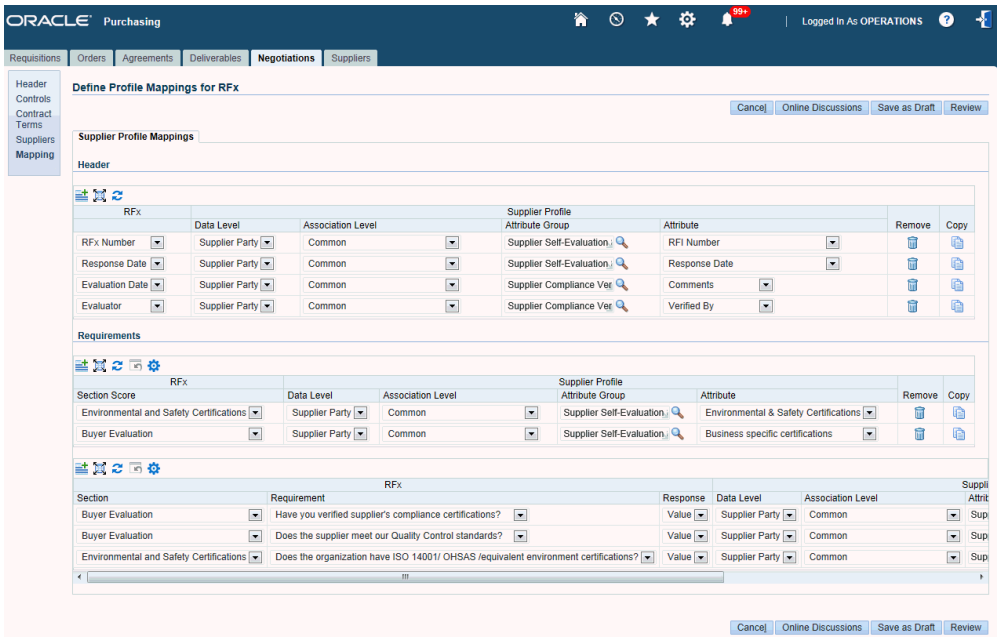
5. Use the Requirements section to set the various pre-qualification requirements, the evaluation criteria and the scoring teams.



6. Invite Suppliers



The RFI document enables buyers to invite eligible suppliers to enter their information in the RFI. Identify based on predefined set of criteria. Examples of some criteria for adding suppliers include: years of experience in the construction industry, type of commodity of purchase. To invite suppliers, click the Suppliers link. The Invited Suppliers page appears. Select the suppliers and add them to the invitation list.



If you have set up Supplier Profile Mapping, then this feature helps you as a buyer to map the responses from the supplier to database attributes. Capturing supplier responses helps in integrating supplier information from an external source. For information on how to set up Supplier Profile Mapping, refer to the *Oracle Supplier Management Implementation and Administration Guide.*

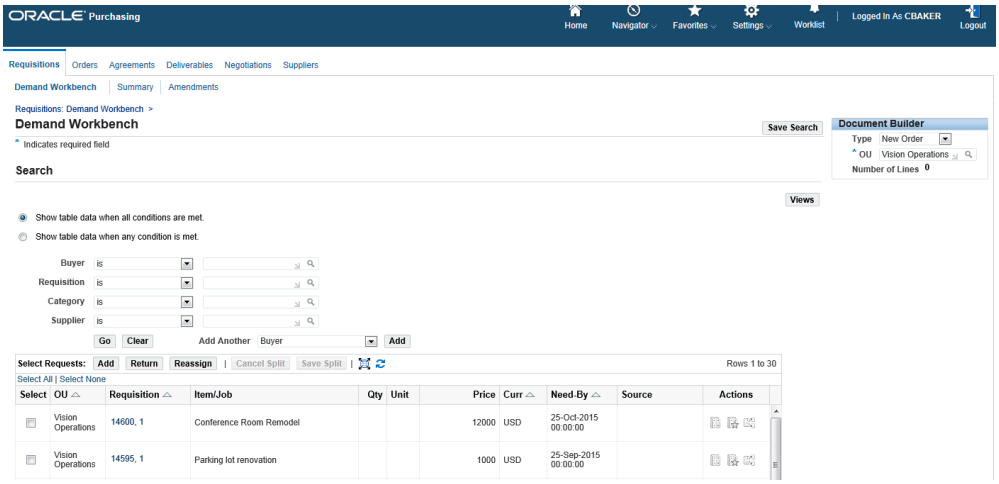
After completing the RFI details, click Submit for Approval. Depending on the approvals set in your enterprise, the RFI is routed for approval or automatically approved.

Processing Approved Requisitions for Complex Work

Buyers view approved requisitions using Buyer Work Center in Oracle Purchasing and take further action.

To process approved requisitions:

1. Log in to the Purchasing responsibility.
2. Click Demand Workbench.
3. View approved requisitions in the Demand Workbench page. As a buyer, initiate further action on an approved requisition.



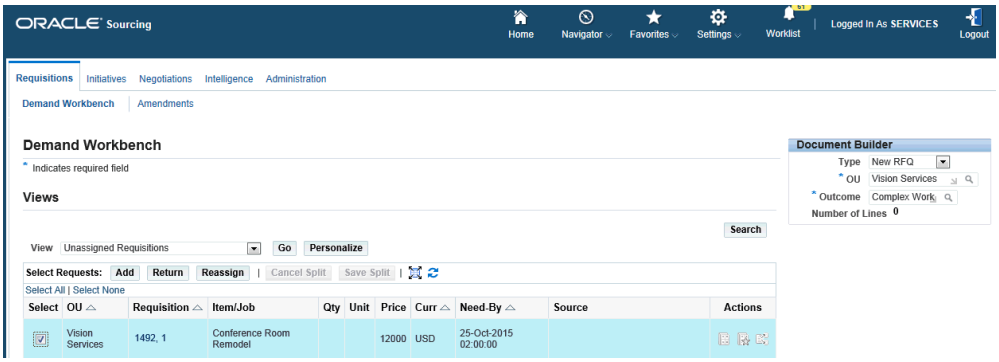
Creating Sourcing RFQs for Complex Work

RFQs (Request for Quote) support the full business process to solicit quotes from suppliers. The suppliers' responses to the RFQ allow the buyer to compare quotes and negotiate the best price and specifications for the good or service. RFQs enable buyers to collect quotes from suppliers for complex and hard-to-define items or services. Once suppliers have submitted an initial round of quotes, buyers can review quotes and award the RFQ or submit a modified RFQ for another round of quoting.

Use Oracle Sourcing to create a RFQ from a requisition for complex work. Use the RFQ to negotiate with suppliers on complex contract terms.

To create a sourcing RFQ for complex work:

1. Navigate to the Demand Workbench in Buyer Work Center.

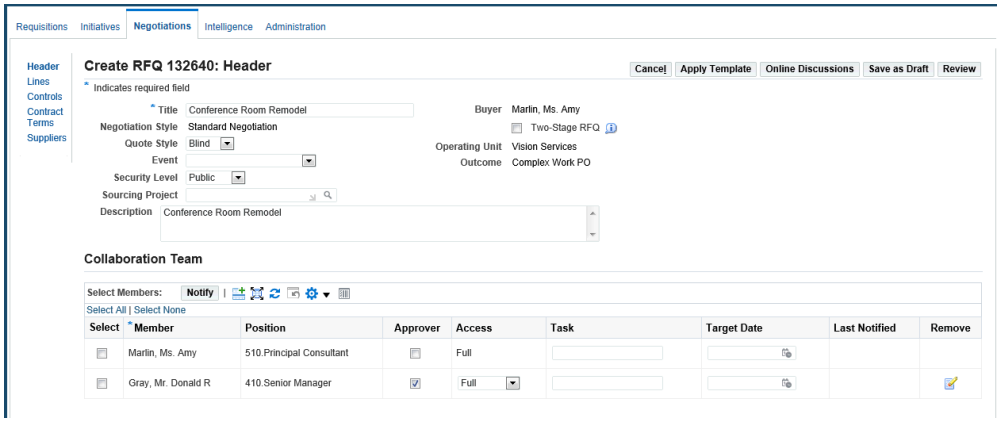


2. In the Demand Workbench page, Document Builder region:
   - Specify the outcome document. Note: 'Outcome' is the same as purchasing Document Style. It is critical that you select the correct Outcome that is setup to

process complex work specific attributes such as advances, pay items, and recoupment.

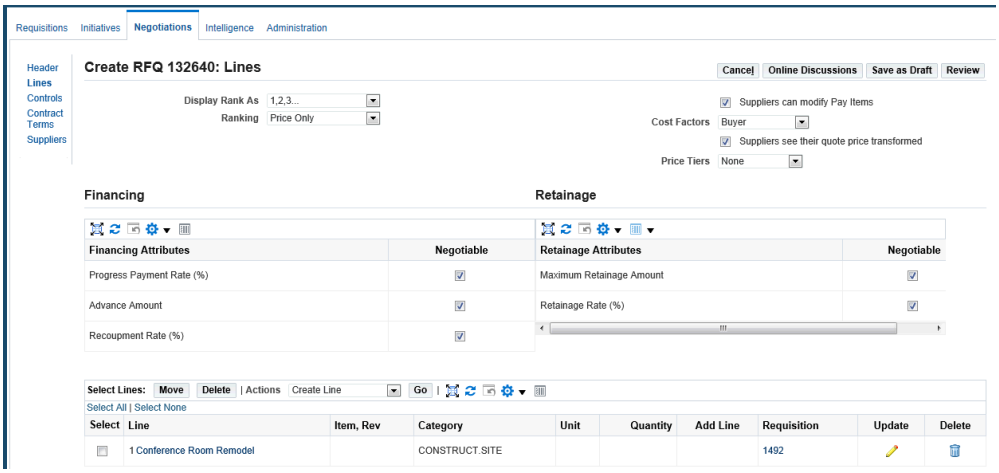
- Specify the negotiation style that you want to use for complex work.
- Add the requisition line and click Create in the Document Builder section. The application converts the requisition to a RFQ and the RFQ has a reference to the base requisition. Buyers can control whether suppliers are allowed to negotiate payment terms such as Advances, Recoupment rate, Maximum Retainage Amount and Retainage Rate.

The Create RFQ Header page appears with some information defaulting based on the requisition.



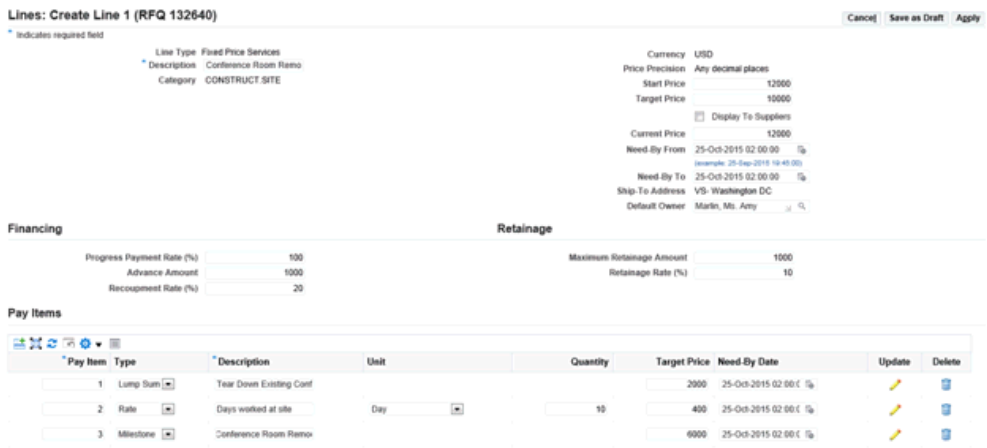
3. Enter the RFQ title and verify the following field values: Buyers, Operating Unit, and Outcome. The Security Level field default value is set to Public.

4. Click Lines to display the Create Lines page.



5. In the Create Lines page:
   - Select 'Suppliers can modify Pay Items' to allow suppliers to modify or propose pay items.
   - Select 'Suppliers see their quote price transformed'.
   - Select the following Financing and Retainage Attributes to allow suppliers to negotiate on complex payment terms:
     - Progress Payment Rate%
     - Advance Amount
     - Recoupment Rate (%)
     - Maximum Retainage Amount
     - Retainage Rate (%)

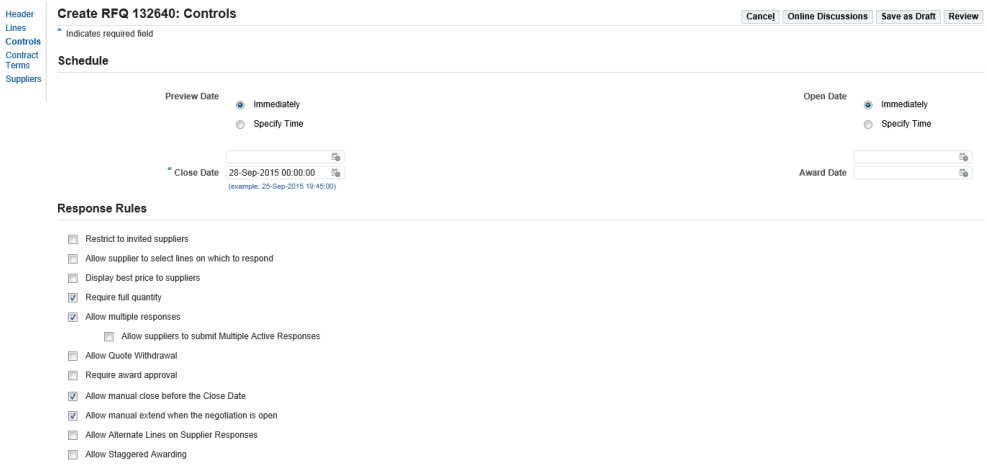
6. To add complex services terms values to the RFQ line, click the Update icon for a line to define complex services terms.



- Ensure that there is a default owner who certifies work progress.
- Specify the Financing and Retainage terms.
- In the Pay Items region, define the progress payment schedule.

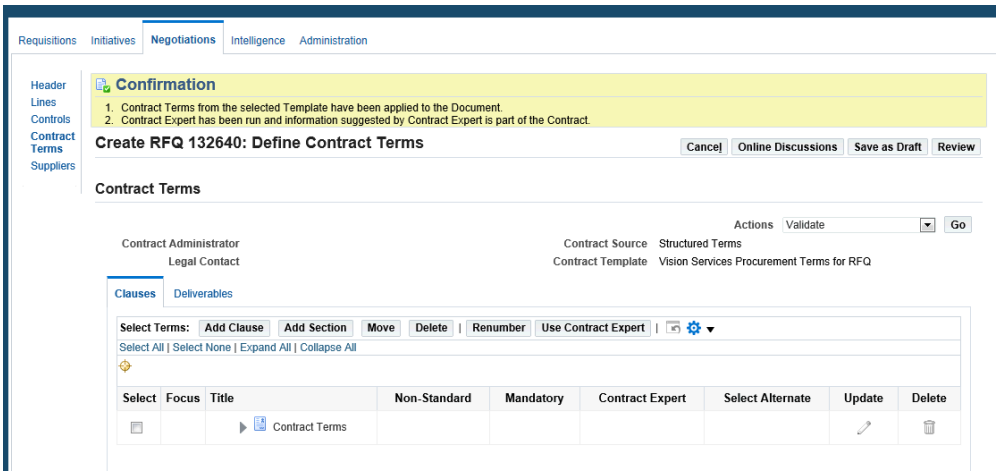
7. Click Controls.

8. Specify control, which allows the buyer to choose the Open and Close date/time for the negotiation process along with some response rules.

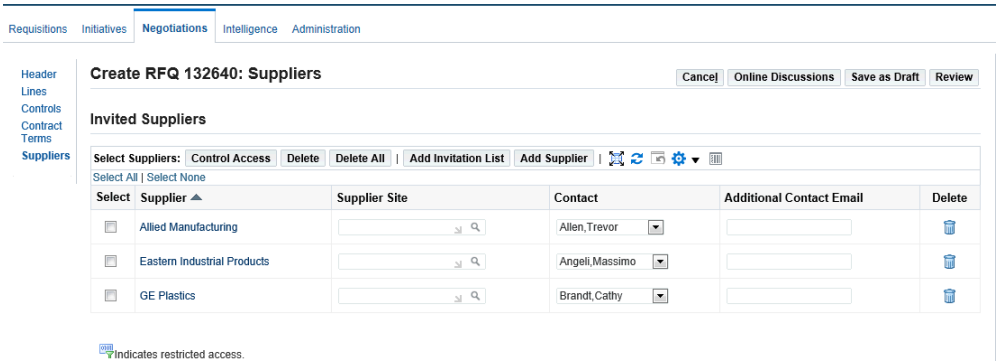


9. If Oracle Procurement Contracts is licensed and implemented, then you can use the Contract Terms page, which allows the buyer to add a contract (terms and conditions) to a Sourcing document. You can accept the default contract template or select a different contract template and click Apply. The page updates with contract terms, clauses, and various columns of info and action buttons. There is also an Action bar at right side in which you can validate the contract to identify any errors

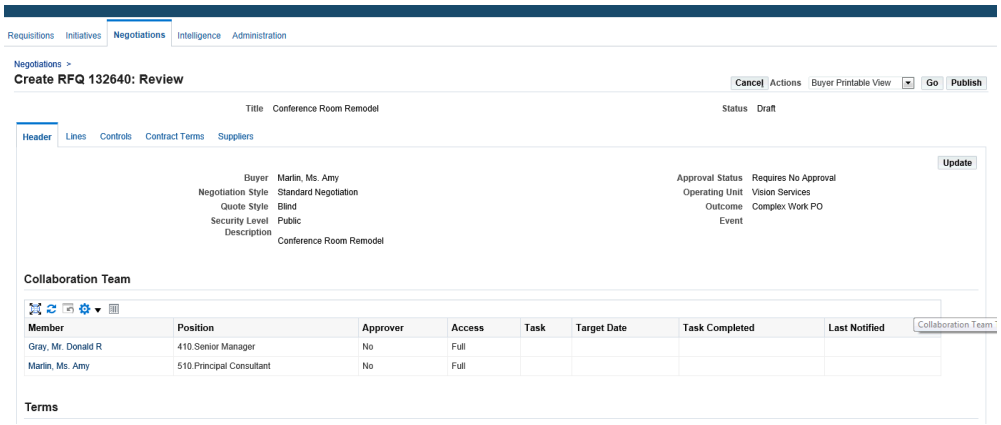
or warnings.



10. Add Suppliers to invite suppliers to the negotiation by selecting from a pre-defined list or search for a specific supplier. Make sure that you select the proper supplier user and site.



11. In the Review and Publish page, review all the information, data, controls, dates. You can generate a PDF version of the negotiation while the document is in draft status. You can print a 'buyer' version that includes all the information on the document such as the collaboration team, invitation list. The draft and buyer versions of the PDF include watermarks to avoid confusions with the supplier version of the document.



12. Publish the RFQ for the benefit of suppliers.

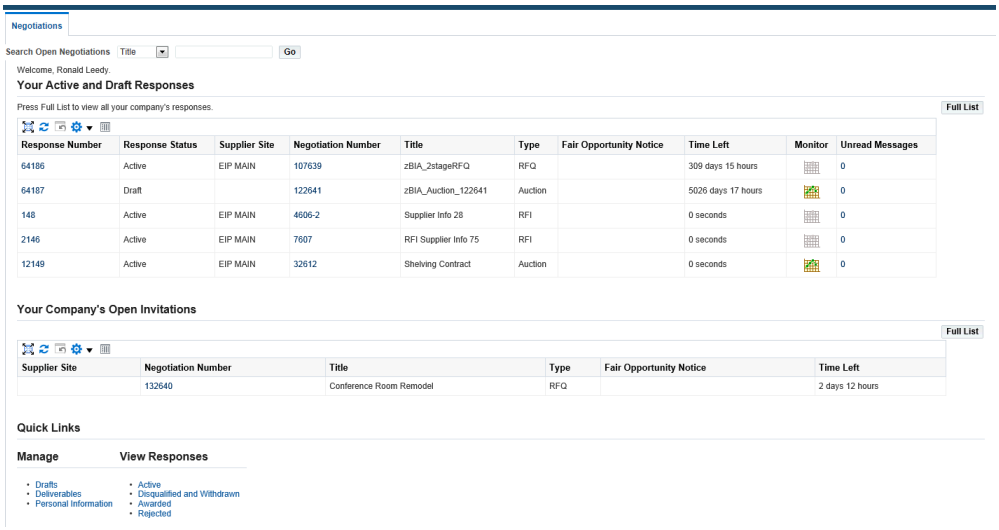
    For more information on RFQs, refer to the *Oracle Sourcing User Guide*.

Creating Quotes

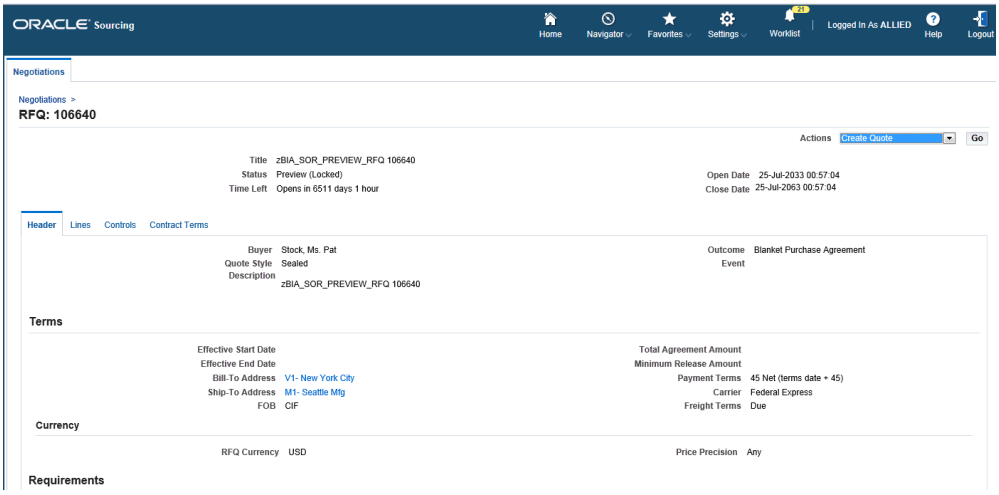
After the buyer publishes the RFQ for the benefit of suppliers, interested suppliers create quote for the RFQ.

To create a quote as a supplier:

1. Log in to Sourcing Suppliers. In the Sourcing Home page, click the RFQ number under 'Your Company's Open Invitation' section. Find your negotiation and click the negotiation number link.



2. On the RFQ summary page, select the Create Quote action.



3. If the buyer has defined Terms and Conditions, read and accept the negotiation terms and conditions. After reading the terms and conditions, click Accept.

Negotiations >

Terms and Conditions

Cancel Accept

The following terms and conditions must be accepted before a quote is placed in this RFQ.

Vision Corporation reserves the right to reject any and all responses for any reason.Vision's decision as to which supplier will be asked to participate in a formal Solicitation process will be based on the overall responses submitted by each supplier, and will include such things as service areas covered; telecommunications experience; commercial collections experience and financial stability. This Solicitation is not a commitment to purchase, and any expenditures incurred in preparation and submission of responses shall not be reimbursed by Vision Corporation

All responses meeting the stated requirements and specifications except for minor exceptions and deviations, shall be considered. Failure to meet requirements may disqualify a response from the selection process.

All information disclosed to suppliers by Vision Corporation, including the information contained in this document, is considered proprietary to Vision Corporation. It may not be disclosed to others without prior written consent from Vision Corporation.

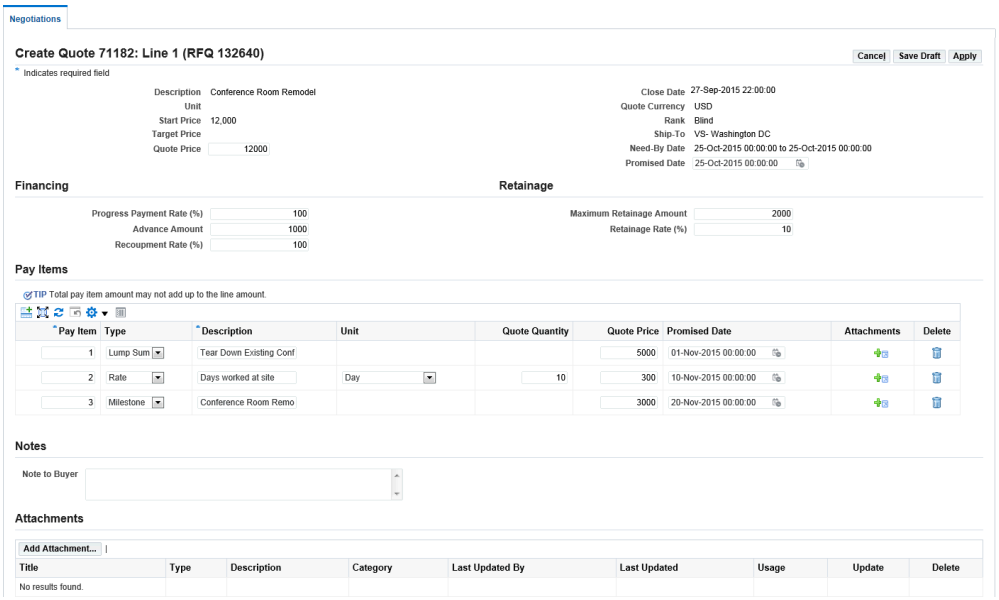
A formal presentation and/or demonstration by the supplier may be required at a subsequent time.

Attachments

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete	Publish to Catalog
No results found.									

* ☑ I have read and accepted the terms and conditions

4. In the Create Quote page, view the information in the Header and Lines subtabs. In the Lines section are the item details. Enter the following required fields:
   - Quote Price
   - Promised Date



5. Update the line to negotiate on Financing and Retainage terms. You can enter values for the attributes that are specified as negotiable in the sourcing document. Values for non-negotiable attributes cannot be changed and are view only. Based on the RFQ setup, the supplier is allowed to modify all the Complex Services Finances, Retainage, and Pay Items attributes.

6. Propose a modified Progress Payment Schedule online or using the spreadsheet upload. Review the quote details and submit.

   For more information on submitting quotes, refer to the *Oracle Sourcing User Guide*.

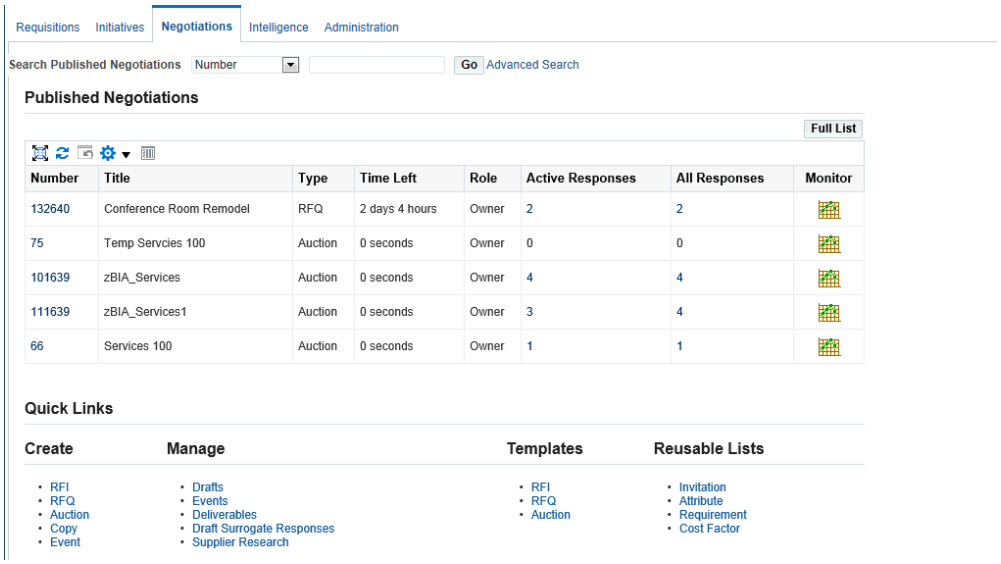
Comparing and Analyzing Complex Work RFQs

Using Oracle Sourcing, buyers can compare the quotes received from the invited suppliers. The suppliers' responses to the RFQ allow the buyer to compare quotes and negotiate the best price and specifications for the good or service. RFQs enable buyers to collect quotes from suppliers for complex and hard-to-define items or services. Compare quoted prices, financing and retainage terms in detail in the analysis before an award decision is made.

To compare quotes:

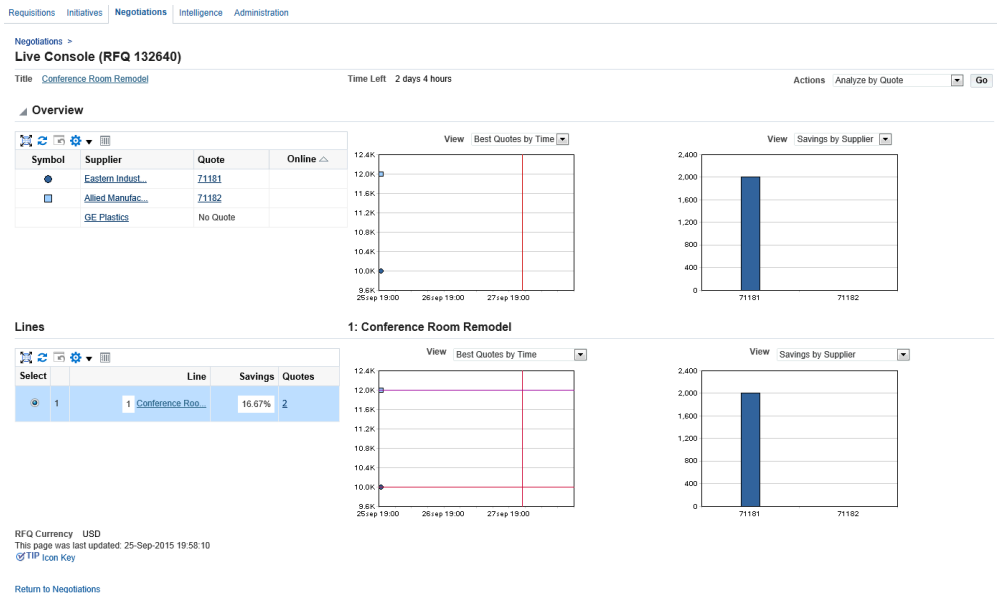
1. Log in to the Sourcing Super User responsibility.

2. Navigate to the Sourcing Home page.



3. Select your published negotiation.

4. Use Live Console or the Compare Quotes page to compare quoted, financing, and retainage terms.



5. In the Negotiation page, select the Award by Line action and click Compare. The Compare Quotes page appears. View the column for RFQ Target, then the various supplier values. As a buyer, view the important Complex Services attributes to determine which supplier is providing the best terms.

Negotiations > Live Console (RFQ 132640) > Award by Line (RFQ 132640) > Award Line: RFQ 132640 - Line 1 >

Award Line 1: Compare Quotes (RFQ 132640)

Cancel Actions Save Award Go

Title Conference Room Remodel
Description Conference Room Remodel

Status Closed
Requisition 1492
Category CONSTRUCT.SITE

Quotes

Enter award quantities to calculate the total award amount and possible savings for this line.
Show Chart

Recalculate Award

Label	RFQ Targets	Eastern Industrial Products	Allied Manufacturing
Supplier Site		0.00	0.00
Supplier Contact		Leedy, Ronald	Francis, Veronica
Quote Information			
Shortlist		✓	✓
Quote		71181	71182
Quote Total (USD)		10,000.00	12,000.00
Rank		1	2
Promised Date	25-OCT-2015 02:00:00 to 25-OCT-2015 02:00:00	01-Nov-2015 01:00:00	25-Oct-2015 02:00:00
Financing			
Progress Payment Rate (%)	100	100	100
Advance Amount (USD)	1,000.00	1,000.00	1,000.00
Recoupment Rate (%)		100	100
Retainage			
Maximum Retainage Amount (USD)	1,000.00	0.00	2,000.00
Retainage Rate (%)	10	0	10
Pricing			
Line Total (USD)		10,000.00	12,000.00
Price (Quote Currency)		10,000 (USD)	12,000 (USD)
Price (USD)	10,000	10,000	12,000
Current Price (USD)	12,000	12,000	12,000

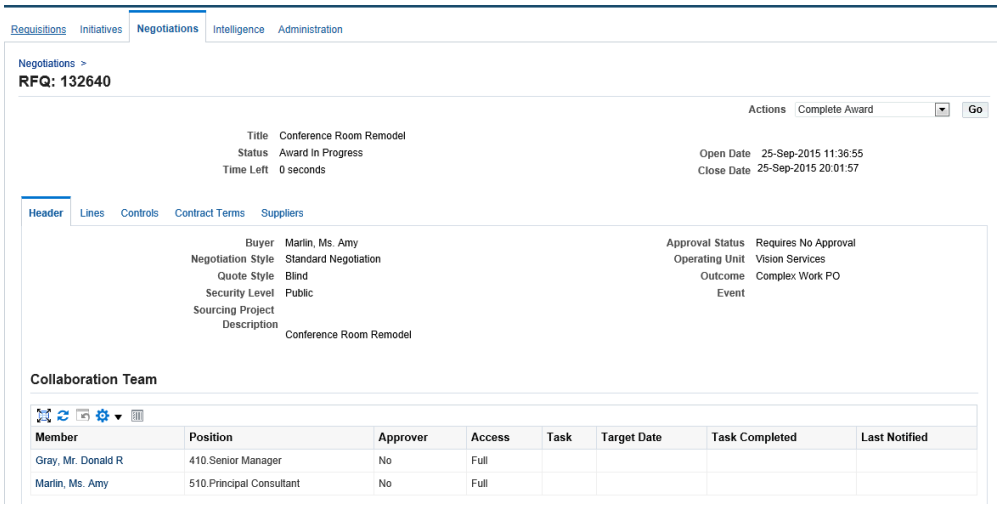
6. Select a supplier to award the line and save the award.

Awarding Complex Work RFQs

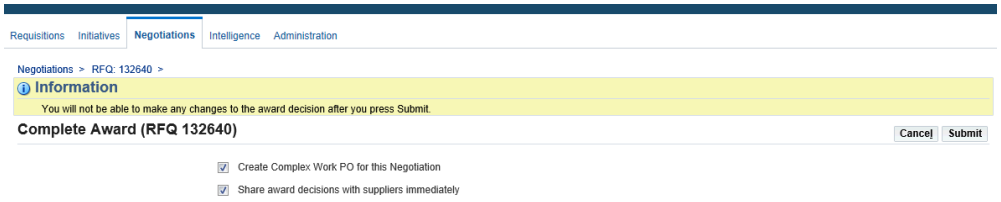
After the RFQ Analysis is completed and the negotiation is closed, as a sourcing user begin awarding business. Integration between Oracle Sourcing and Oracle Purchasing ensures that all the negotiated terms and the progress payment schedules are copied to the contract document.

To award a complex work RFQ:

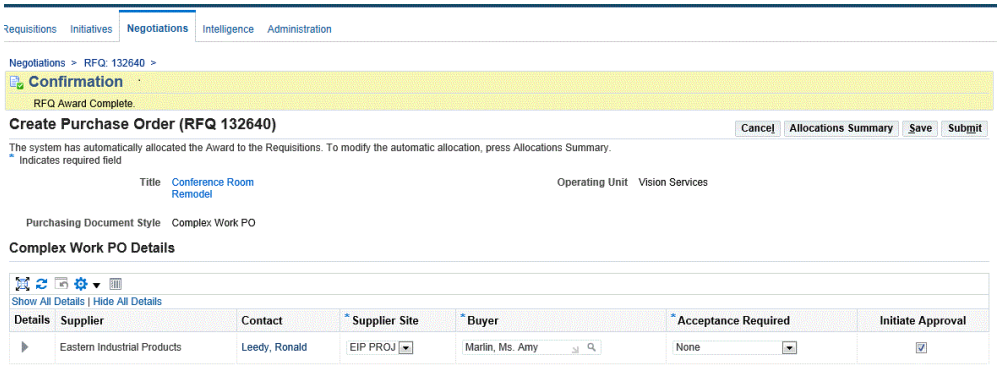
1. Select the Complete Award action.



2. On the Complete Award page, click Continue to begin the purchase order creation.



3. On the Review and Submit page, click Submit. The Create Purchase Order page appears.



4. Click Submit. The application completes the order creation process.

5. Navigate to Buyer Work Center in Oracle Purchasing to verify the purchase order.

6. Click the Orders tab and view the recently created purchase order.

7. Click the Lines and Pay Items subtabs to verify the complex work terms for Advance, Recoupment %, Retainage %, and Pay Items.

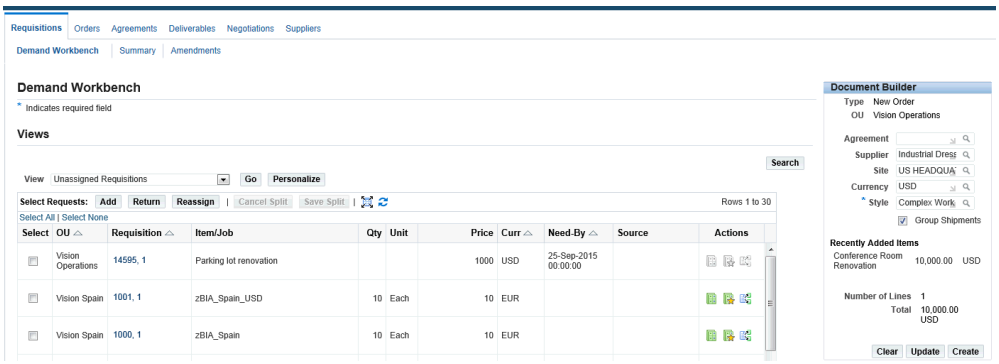
   For more information on awards, refer to the *Oracle Sourcing User Guide*.

Processing Complex Work Orders Created from RFQs

As a buyer, use the Orders tab in Buyer Work Center to search for the order created from the Sourcing RFQ and add the information required for the complex work order.

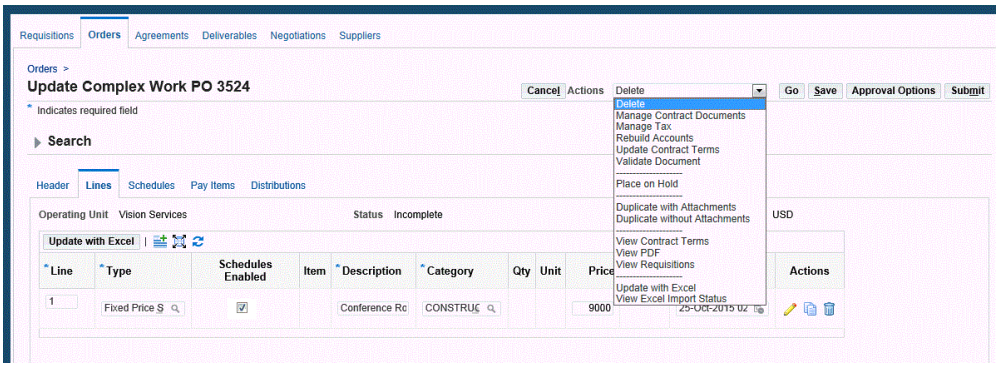
You can create a complex purchase order using any one of the following methods:

- Author a new complex purchase order.
- Copy a complex purchase order (When copying a complex purchase order, the schedules linked to the pay item are not copied to the newly created purchase order document. The backing requisition will not be copied.).
- Use Demand Workbench to autocreate a complex purchase order from requisitions.



To process a complex work order created from the Sourcing RFQ:

1. Navigate to the Buyer Work Center in Oracle Purchasing.
2. Click the Orders tab.
3. Locate the purchase order created from the Sourcing RFQ.
4. Click Update and Go to add individual complex work requirements.



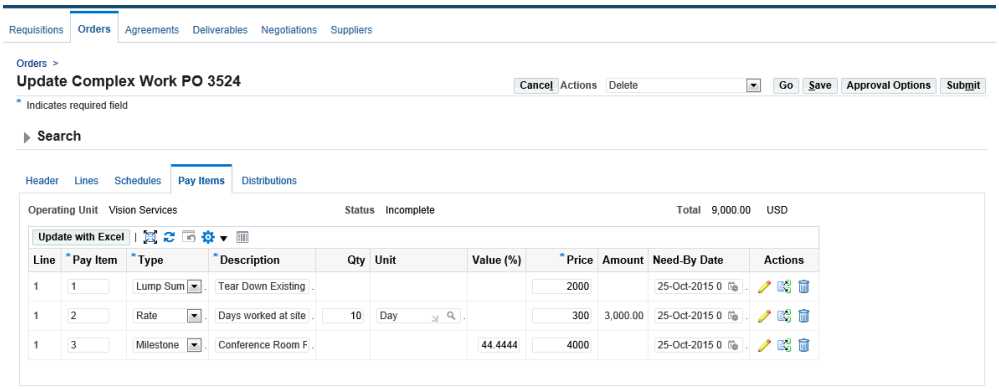
5. Enter Complex Work Purchase Order Lines

   The role that Oracle Purchasing plays is primarily in the authoring and monitoring portion of the Complex Work flow. In addition, the purchase order styles that dictate which of the complex work procurement attributes are available are created in Oracle Purchasing.

   Complex payment terms for financing and retainage are entered or stored on the line. If the purchase order is created from the Sourcing RFQ, then the advance amount and the recoupment rate are the negotiated values from the RFQ. The retainage related information is also negotiated and the values are defaulted from RFQ. Billing details such as Charge Account, Accrue at Receipt, and Project Information are defaulted as and when new pay items are created for the line. The Enable Schedules check box determines whether a line will have schedules or pay items. This check box is visible only if document style has both Schedules and Progress Payments enabled.

6. Enter Complex Work Purchase Order Pay Items

   Use the Pay Items tab to provide a pay item description, quantity, unit of measure, price and a need-by date. The system also enables buyers to specify additional details for pay items.



If a purchase order is created from the Sourcing RFQ, then the pay items that are previously negotiated are transferred from the RFQ, however, in other situation, as a buyer you can specify the following pay item information:

- Pay Item Number
- Type:

  Rate

  Lumpsum

  Milestone

Complex work procurement always creates a default pay item for the purchase order line. The type of Pay Item depends on the Pay Item types enabled on the document style and also the purchase order line type.

- For Lines with a value basis of Quantity, only Milestone Pay Items are possible, so you cannot create Rate or Lumpsum Pay Items for a Goods Line.
- For Fixed Price Services and Fixed Price Temp Labor Lines, you can create all three types of Pay Items: Rate, Lumpsum and Milestone. In this case, if all three types are enabled on the Document Style, a Lumpsum Pay Item is created by default.

Requisitions | Orders | Agreements | Deliverables | Negotiations | Suppliers

Requisitions: Demand Workbench > Update Complex Work PO >

Update Pay Item 1 (Complex Work PO 6384)

Cancel | Actions | View Requisitions | Go | Previous Pay Item | Next Pay Item | Apply

Operating Unit: Vision Operations
Line: 1
Line Description: Conference Room Renovation
Currency: USD

* Indicates required field

Closure Status: Open
* Type: Lump Sum
* Description: Conference Room Renovation
* Price: 10000
Amount Received: 0.00
Amount Financed:
Amount Canceled: 0.00

Work Details

* Location: V1- New York City
Organization: V1
Need-By Date: 27-Oct-2015 00:00:00 (example: 25-Sep-2015 19:45:00)
Promised Date:
Requester: Sole, Mr. Samuel
Owner:

Receiving Controls

Receipt Days Early:
Receipt Days Late:
Last Accept Date:
Receipt Date Action:
Receipt Close Tolerance (%): 0
Over Receipt Tolerance (%): 5
Over Receipt Action: Warning

Link Schedules

Add Schedules

Line	Schedule	Item	Line Description	Quantity	Unit	Amount	Location	Organization	Delete
No results found.									

Billing

PO Charge Account: 01-000-1580-0000-000 (Company-Department-Account-Sub-Account-Product)
Accrue at Receipt: No
Match Approval Level: 3-Way
Invoice Match Option: PO(1)
Invoice Close Tolerance (%): 0

Project: eAM Building 500
* Task: 2
* Expenditure Type: Construction
* Expenditure Org: Vision Operations
* Expenditure Item Date: 26-Sep-2015

Use the Link Schedules region to map schedules to pay items and control creation of work confirmation based on receipt of materials in inventory. The Link Schedules region is visible only if the document style has Progress Payments and Schedules check boxes enabled, and the pay item type is either Milestone or Lump Sum. The Linked Schedules region on the Pay Item Details page displays all the schedules linked to the selected pay item.

7. Add Contract Terms

   As a buyer, add Contract Clauses and Deliverables using the Actions list of values. The Add Contract Terms action enables buyers to integrate with Oracle Procurement Contracts.

8. Specify Contract Lines

   If the Sourcing RFQ is converted to a purchase order, then the purchase order line is created from the information on the RFQ. The Contract Lines page allows the buyer to capture several pieces of critical information for the complex services contract. Buyers describe a scope of work to provide a detailed description of the service that is being procured. The scope of work is captured either as the line description or is attached as an external document.

9. Add Distribution Details

   Navigate to the Distributions tab to view the distributions that are automatically created for all the lines and pay items of the complex work order. Click the pencil icon to view the Distribution details. Using the Distributions details page, you can add project related information such as Project Name, Task, and Expenditure Type etc to the distribution.

10. Submit the complex work order for approval. When the order is approved by the

various approvers, these actions can be performed:

- Review of project commitment by the Project Manager.
- Creating work confirmations by the supplier or internal users when work is completed in stages/phases.
- Approving work confirmations by the buyer.
- Accounting processes – Invoicing and Payments.

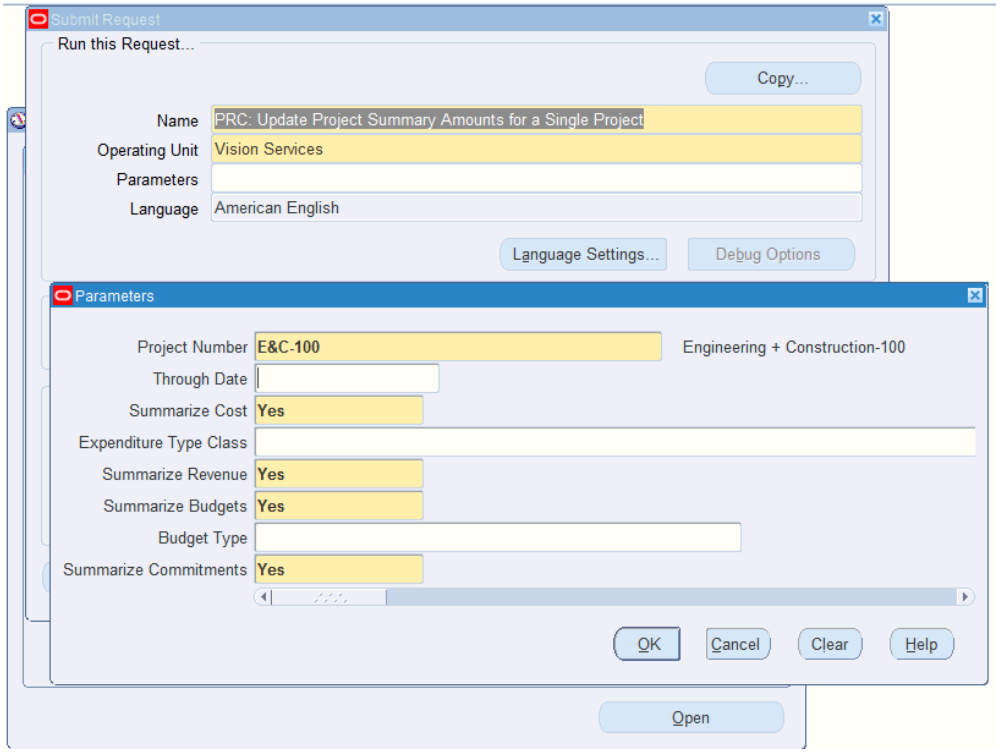
Reviewing the Project Status of a Complex Work Order

As a project manager, review the project status of complex work orders using the Project Status Inquiry window in Oracle Projects.

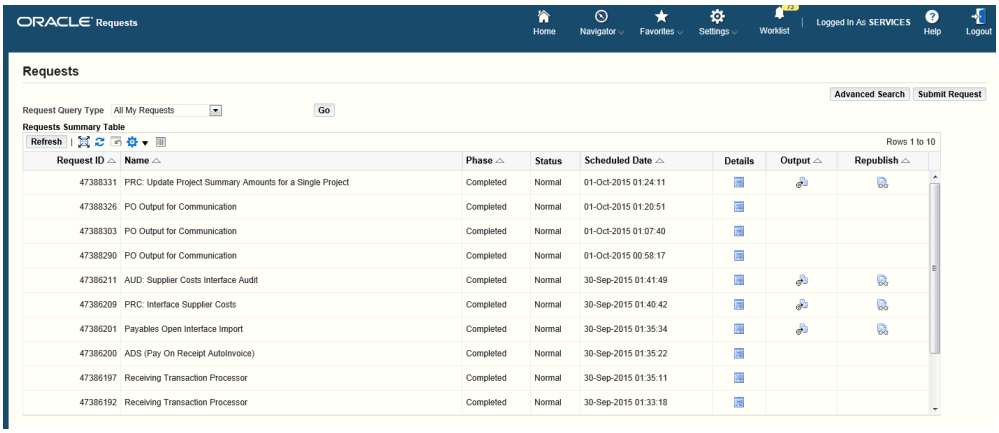
To update the project summary amounts, run the PRC: Update Project Summary Amounts for a Single Project program in Oracle Projects. This process updates the project summary amounts with new cost, commitment, and revenue transactions and any new baselined budget versions. You can run this process as many times as you want.

To run the concurrent program PRC: Update Project Summary Amounts for a Single Project

1. Navigate to the Submit Request window to run the concurrent program PRC: Update Project Summary Amounts for a Single Project.



2. Enter the following parameters for the concurrent program:
   - Project Number
   - Through Date (LOV) – optional
   - Summarize Costs – Yes (default)
   - Expenditure Type Class – optional
   - Summarize Revenue – Yes (default)
   - Summarize Budgets – Yes (default)
   - Budget Type – optional
   - Summarize Commitments – Yes (default)
3. Submit the concurrent request and ensure it completes successfully.

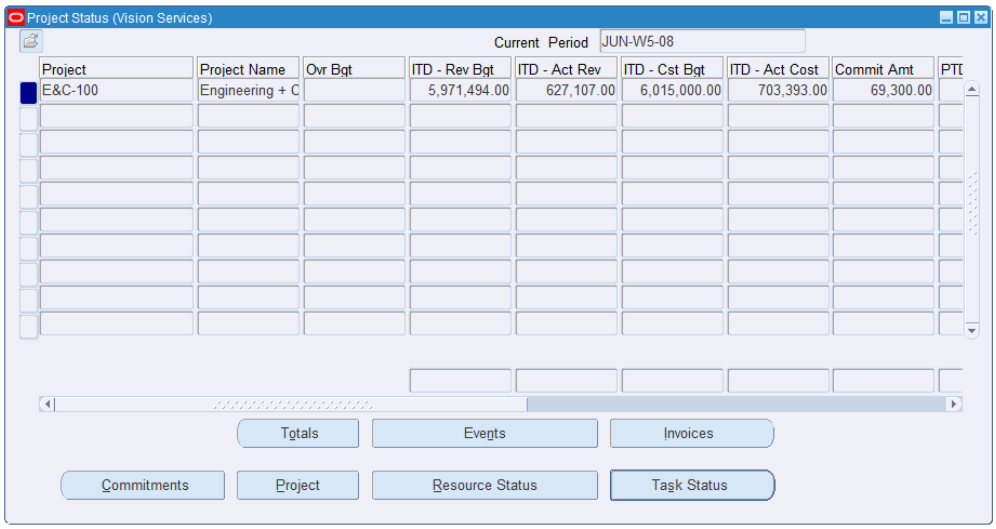


To view the project status:

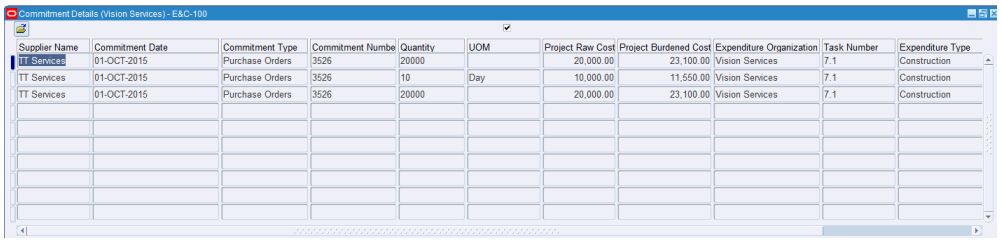
1. Navigate to the Project Status Inquiry > Project Status Inquiry window that opens the Find Project Status window.

2. Enter the Project Number or select it from the LOV as your search criteria.

3. Click Find. The Project Status window displays the totals at the Project level. View your purchase order amount plus any calculated tax in the Commitment Amount column.



4. Click Commitments and then click Find to open the Commitment Details window and display the Pay Items from your complex work order. Note these amounts may include tax.



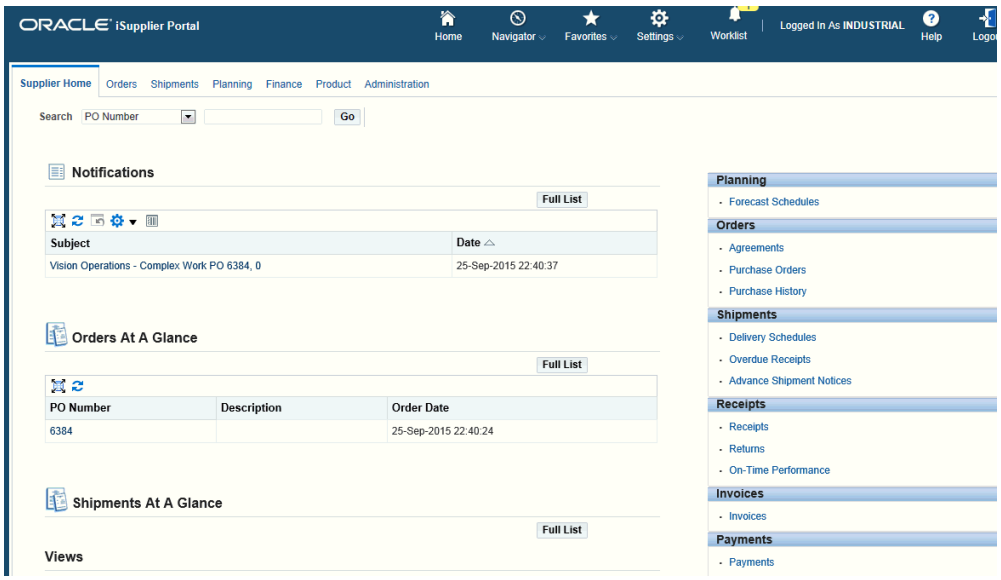
For more information, refer to the guide *Oracle Projects Fundamentals*

Viewing the Complex Work Purchase Order as a Supplier

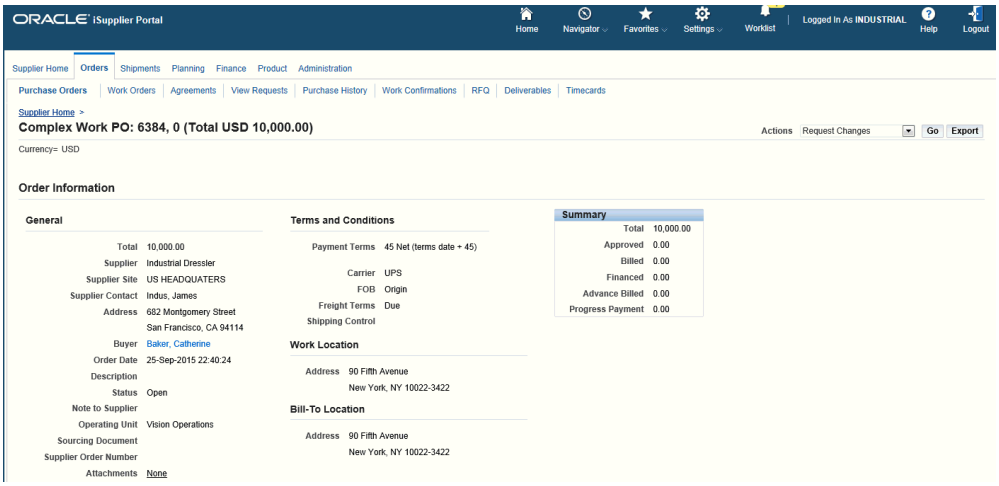
In this step, the Supplier views the complex work purchase order using the iSupplier Portal (iSP).

To view the complex work purchase order as a supplier:

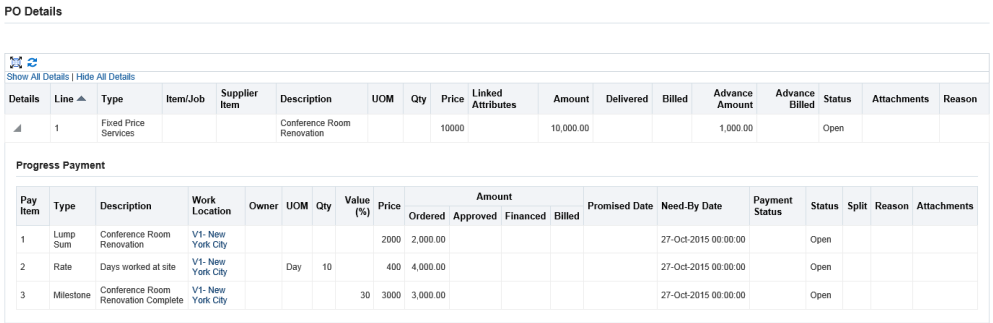
1. Navigate to the iSupplier Portal Full Access responsibility.
2. In the Orders At a Glance region, click the purchase order number.



The summary section lists the various amount details specific to the complex work such as Advance Billed, Progress Payments, etc.) If no invoices or payments are created for the purchase order, then all amounts are 0.



3. View the Pay Items details for the purchase order with status of Open.



Details	Line	Type	Item/Job	Supplier Item	Description	UOM	Qty	Price	Linked Attributes	Amount	Delivered	Billed	Advance Amount	Advance Billed	Status	Attachments	Reason
	1	Fixed Price Services			Conference Room Renovation			10000		10,000.00			1,000.00		Open		

Pay Item	Type	Description	Work Location	Owner	UOM	Qty	Value (%)	Price	Amount				Promised Date	Need-By Date	Payment Status	Status	Split	Reason	Attachments
									Ordered	Approved	Financed	Billed							
1	Lump Sum	Conference Room Renovation	V1- New York City					2000	2,000.00					27-Oct-2015 00:00:00		Open			
2	Rate	Days worked at site	V1- New York City		Day	10		400	4,000.00					27-Oct-2015 00:00:00		Open			
3	Milestone	Conference Room Renovation Complete	V1- New York City				30	3000	3,000.00					27-Oct-2015 00:00:00		Open			

Creating an Invoice and Payment for Advance

Suppliers may request advances themselves using Oracle iSupplier Portal or by presenting an invoice to the buyer. The Payables clerk enters invoices using Quick Invoice or the Invoice Workbench. Use the Invoice entry match to contract advance feature, which prevents over-billing beyond the negotiated value and updates the purchase order with the amount billed.

The Payables clerk can choose to pay the invoice for the advance based on the approved purchase order ensure that the invoice goes through another set of approvals prior to issuing payment. Note that all prepayments must be paid in full before any amounts can be liquidated on subsequent delivery invoices.

To create an invoice:

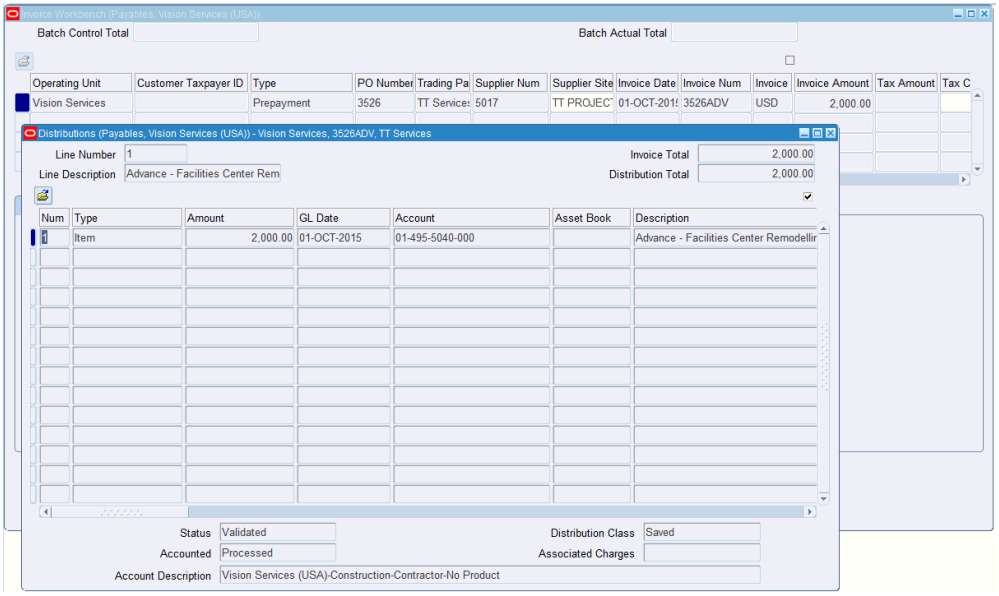
1. Log in to Accounts Payable, Payables responsibility.

2. Create Invoice for Advance (Invoices > Entry > Invoices).

3. Select the invoice type of prepayment.

4. Match to the advance payment item on the purchase order.

5. Process the advance payment.



For more information on how to create an invoice and pay advance, refer to the *Oracle Payables User's Guide*.

Tracking Advance Payments as a Supplier

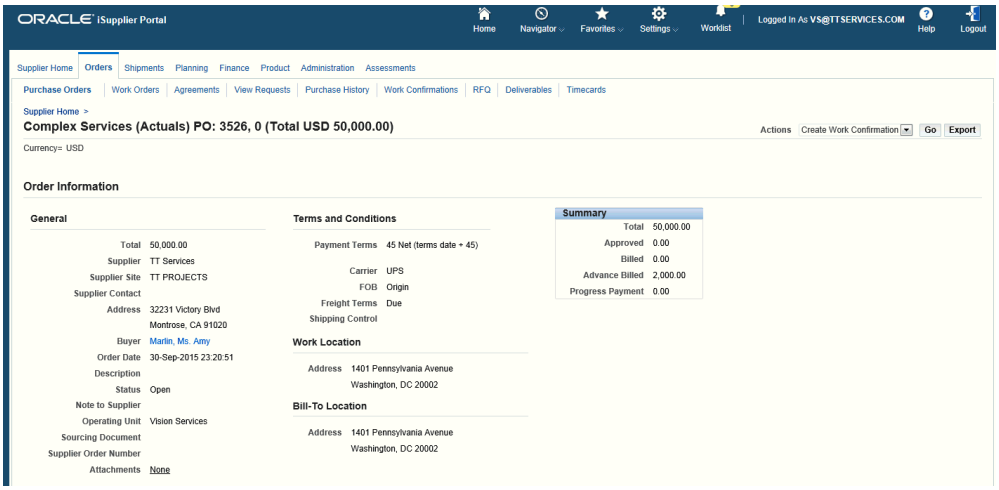
As a supplier, track the progress on individual pay item of the progress payment schedule using Oracle iSupplier Portal.

To track advance payments as a supplier:

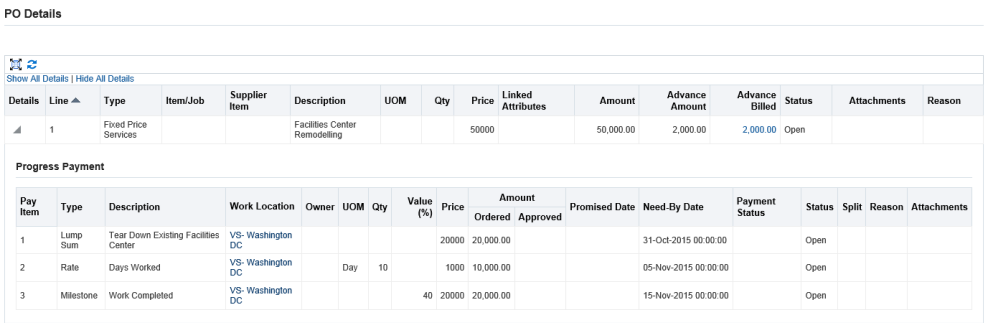
1. Log in to Oracle iSupplier Portal using the iSupplier Portal Full Access responsibility.

2. View the iSupplier Portal home page that shows recent purchase orders in the 'Orders at a Glance' section.

3. Click the PO number link to open the purchase order details page.



If invoice and advance are created for a purchase order, then the Summary section lists the various amount details specific to complex work such as Advance Billed, Progress Payments. The Progress Payments section displays the details and status of the progress payment schedule.



Details	Line	Type	Item/Job	Supplier Item	Description	UOM	Qty	Price	Linked Attributes	Amount	Advance Amount	Advance Billed	Status	Attachments	Reason
	1	Fixed Price Services			Facilities Center Remodelling			50000		50,000.00	2,000.00	2,000.00	Open		

Pay Item	Type	Description	Work Location	Owner	UOM	Qty	Value (%)	Price	Amount Ordered	Amount Approved	Promised Date	Need-By Date	Payment Status	Status	Split	Reason	Attachments
1	Lump Sum	Tear Down Existing Facilities Center	VS- Washington DC					20000	20,000.00			31-Oct-2015 00:00:00		Open			
2	Rate	Days Worked	VS- Washington DC		Day	10		1000	10,000.00			05-Nov-2015 00:00:00		Open			
3	Milestone	Work Completed	VS- Washington DC				40	20000	20,000.00			15-Nov-2015 00:00:00		Open			

4. Use the purchase order information to track the due dates for each pay item on the progress payment schedule, work progress on each pay item and the payment status of a pay item. The supplier can also use this page to initiate Work Confirmations for the contract.

Using Work Confirmations (Complex-Work Purchase Orders only)

Over the course of a complex work project, various pay items defined for the contract come due. To notify a buyer that a pay item needs to be processed for a completed unit of work, you can create a work confirmation.

> **Note:** If there are any pay items linked to receipt of materials, then you cannot create work confirmations for those as long as the material is not fully received. Work confirmation can be created for the pay items only

if the schedules mapped to the pay item are fully received. You can select a pay item only when all the schedules mapped to the Pay item are in the Closed for Receiving or Cancelled status. You cannot create a work confirmation if any of the mapped schedules to the pay item are in the Frozen, Open, or Finally Closed status.

To search for existing work confirmations:

1. From the home page, click the Orders tab, and then click the Work Confirmation sub-tab. The Work Confirmations page displays with the views listed. You can search for your work confirmations by using the View dropdown and clicking Go.

2. Alternatively, you could search for your work confirmations by using the Advanced Search button. When you click the Advanced Search button, the Work Confirmations Advanced Search region displays. You could use the standard search criteria, or use the Add Another dropdown to search using additional search criteria, such as PO Number, Order Line Number, Work Confirmation, etc.

To create a work confirmation:

1. Access the purchase order.

2. On the **PO Details** page, select Create Work Confirmation from the Actions menu and click Go.

3. From the View menu, select either
   - Pay Items Due This Week
   - Pay Items Due This Month
   - All Pay Items

4. You can also enter and track the progress of the complex work using the following fields:
   - Previously Requested / Delivered
   - Previous Progress %
   - Current Requested / Delivered
   - Material Stored

     Note: The Material Stored field allows the supplier to request a payment for material which has been purchased and stored on

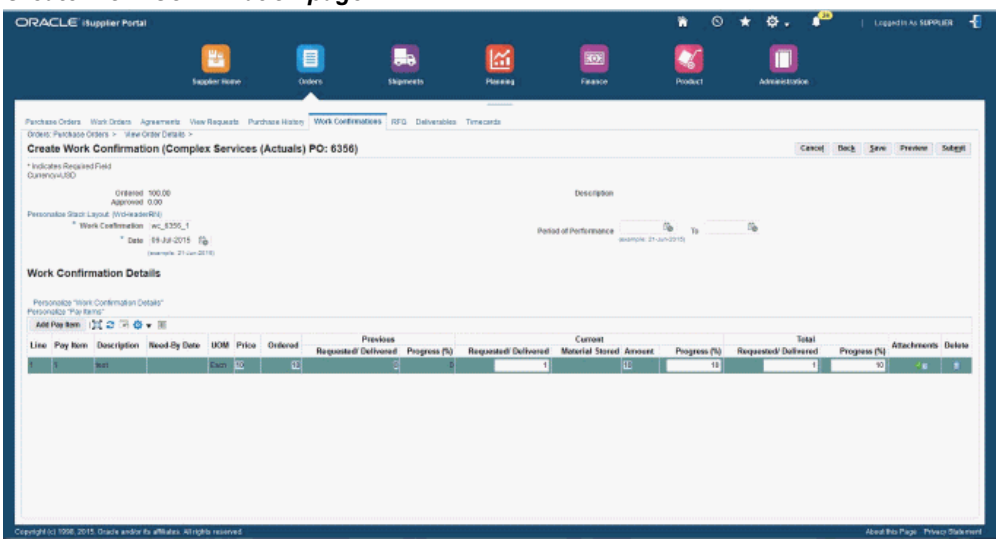
site for use. Using the work confirmation, the supplier can enter the requested amount based on work actually completed, and has an option for requesting payment for material purchased but not yet consumed in work.

- Current Progress %
- Total Requested / Delivered
- Total Progress %

  You can enter / update the values of the Current Progress % and Total Progress % fields, they will be recalculated.

5. Click Go.
6. On the **Create Work Confirmation** page, select one or more pay items and click Next.

Create Work Confirmation page



7. Enter a work confirmation ID.
8. Enter a request date for the work confirmation in the Date field. You can specify the request date as the current date or a past date, however, the date cannot be a future date. The system validates the date to ensure that it is in an open GL period and in open accounting / receiving periods if the request date is entered. When the Work confirmation is created by the buyer on behalf of the supplier then the date validation takes place during creation; if the supplier creates a work confirmation,

then the date validation takes place only during approval of the work confirmation.

9. If this work confirmation reflects a particular span of time, optionally enter performance period dates.

10. Accept the default or enter a value for Requested/Delivered. .

11. Update the Progress Percentage column, if appropriate.

12. Enter comments in the Comments text area. The comments specified at this header level are displayed as part of the notification to the approver.

    You can enter comments for the work confirmation as a buyer, as a supplier or using the iSupplier Portal - Internal View responsibility.

13. Attachments added to the Complex Purchase Order at the pay item level are displayed to the buyer when work confirmations are created.

14. Click Save to keep a draft work confirmation in the system. You can return to the draft later for make further updates or submit it. When you have finished defining your work confirmation, click Submit. Once you click Submit, the approver is notified of the work confirmation and must approve it.

15. Internal users / buyers / contractors can create work confirmation even if the complex purchase order transaction has a status Frozen, however suppliers cannot.

To view/update an existing work confirmation:

You can view existing work confirmations.

1. From the Orders tab, click the Work Confirmations subtab.

2. From the View menu, select either

    - Last 25 Work Confirmations
    - Draft Work Confirmations
    - Rejected Work Confirmations
    - All Work Confirmations

3. The search results show the progress of the complex work order using the following columns:

    - Previous Requested
    - Previous Delivered

- Current Requested
- Current Delivered
- Total Progress %

4. Click the work confirmation number to access and view the work confirmation.

   You can select the work confirmation and click Update if you need to make changes to confirmation or address any issues with a rejected confirmation. You can modify details of a rejected work confirmation as well as add additional items.

   If the confirmation has a status of Processing, Rejected, or Pending Approval, you can select the confirmation and delete it.

5. The supplier submits a work confirmation for approval, and the buyer rejects the work confirmation and adds header level comments stating the reason for rejection; these comments are visible to the supplier when the supplier updates the rejected work confirmation.

6. Buyers or other users using the iSupplier Portal – Internal View responsibility can use the action View Work Confirmation. The View Work Confirmation page displays the Approval History column. The Approval History icon, when clicked, displays the Approval History page that shows you the current and pending approvers. The Approval History icon does not display if the transaction has an error, or has a status of Draft or Processing.

   The Approval History icon is shown to users only if the status of the work confirmation document is: Pending Approval, Error, Rejected, Approved, Processed, Processing Error, Cancelled and Corrected. This icon is not visible if the status of the work confirmation document is Draft or Processing.

   The Approval History page has two regions:

   The first region displays the Approvers sequenced in order according to the date and timestamp of when they took action regarding the notification. This section also displays the approved person and the date of approval along with comments.

   The second region displays the current/pending approvers, the type of approvers and the approver with whom the document is pending.

7. Buyers or other users using the iSupplier Portal – Internal View responsibility can view the status column of the work confirmation documents.

   The status column is displayed as a hyperlink only for Error and Processing Error statuses. The hyperlink opens the View Errors page (if the system captures any errors). For all other status of the work confirmation document, the status column does not have a hyperlink.

   The View Errors page displays all the validation failures that are identified when

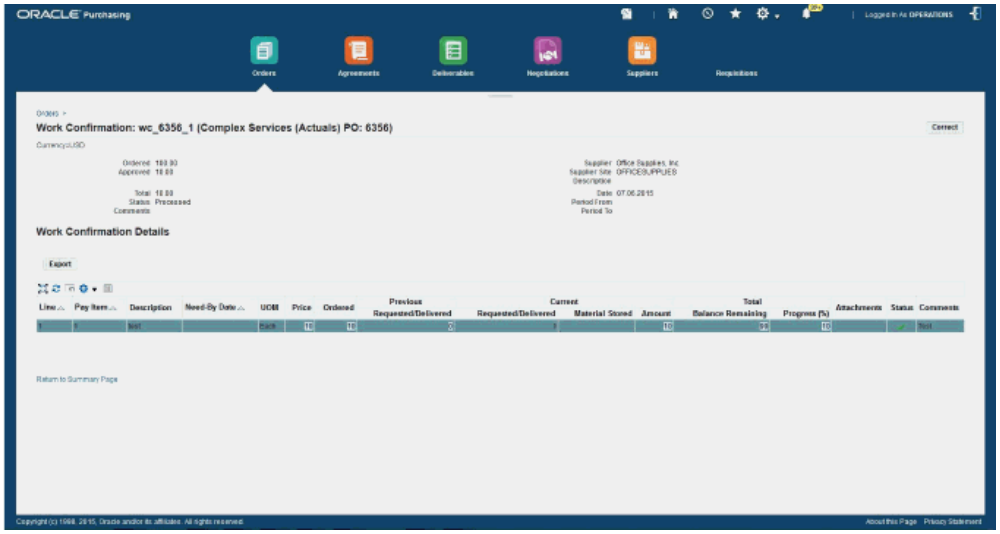
running the Receiving Transaction Processor concurrent program. Internal users cannot perform any action, or take corrective actions using this page.

To correct an existing work confirmation:

You can correct existing work confirmations that are in the Processed or Approved status.

1. From the Orders tab, click the Work Confirmations subtab.
2. From the View menu, select the Work Confirmations I Have Approved option or the All my Work Confirmations option.
3. Click the Go button.
4. The search results show a list of work confirmations as per the option you select in step 2. Click the work confirmation number link of a work confirmation, with the status as processed or approved, to access the required work confirmation details.
5. Click the Correct button.

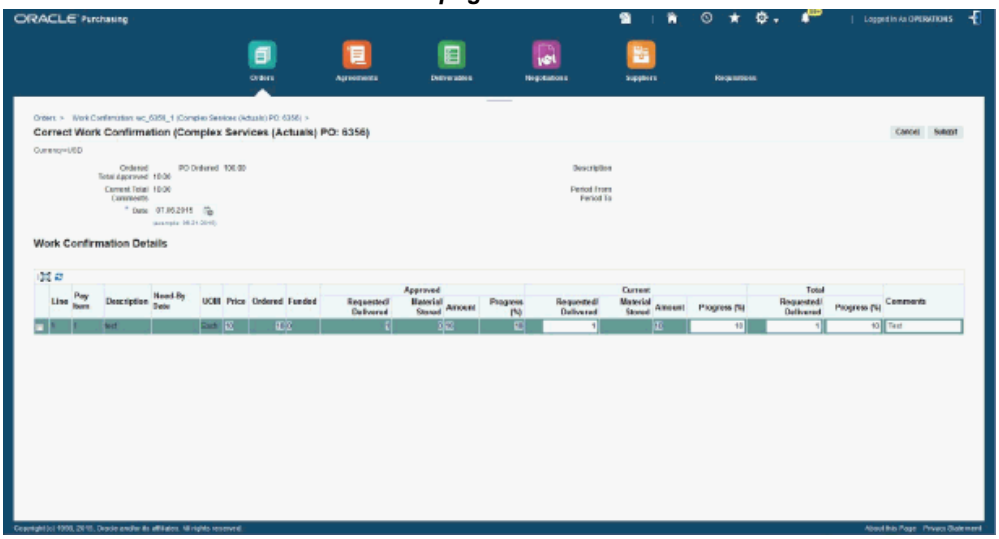
Work Confirmations page



6. Enter the required correction. You can correct details such as the requested/delivered amount/quantity, Date, and the percentage of progress, under the Current and Total headers of the work confirmation.
    - Ensure that the value you enter in the Requested/Delivered or the Progress (%) field is lesser than the approved value.

- Ensure that you enter appropriate comments in the Comments field for each pay item submitted for correction.
- Ensure that you select the pay items for which you want to submit a correction by selecting the appropriate check box.
- You can update or correct the request date as the current date or a past date, however, the date cannot be a future date or earlier than the receipt creation date. The system validates the date to ensure that it is in an open GL period and in open accounting / receiving periods if the date is updated.

Work Confirmation Correction Details page



7. Click the Submit button.
8. You can verify the work confirmation correction after the status of the work confirmation changes to Corrected. You can view the correction details in the Work Confirmation Correction History region on the Work Confirmation Details window.

Using the Response Page for Complex Work Purchase Orders

For complex work purchase orders:

- When the document style has both "Schedules" and "Progress Payments" enabled and if all the lines in the order document has "Schedule" related details then the header region caption displays "Ship-To Address" and "Bill To Address"

- When the document style has both "Schedules" and "Progress Payments" enabled and if any of the lines in the order document has "Pay items" details then the header region caption displays "Work Location" instead of "Ship to Address" and "Bill To Location" instead of "Bill To Address"

- When the Order document has both "Schedules" and "Progress Payments" enabled, then the column name "Pay item" in the changes to "Schedule/Pay item".

Using AME for approving Work Confirmations

Depending on business requirements, administrators can setup approvers and reviewers in AME for work confirmation approval.

Organizations can use the predefined AME transaction type (WCAPPROVE) and Work Confirmation Approval workflow process on the supplied components and their business requirements.

Based on the setup, the Approvers region displays approvers, reviewers, and signers.

Creators of the work confirmation have the flexibility to send Work Confirmation documents to approvers based on the AME setup.

Approvers can edit Work Confirmation when they receive the approval notification.

Approvers can approve, approve and forward, reject, or reassign the Work Confirmation approval notification. They can add their comments to the notification page.

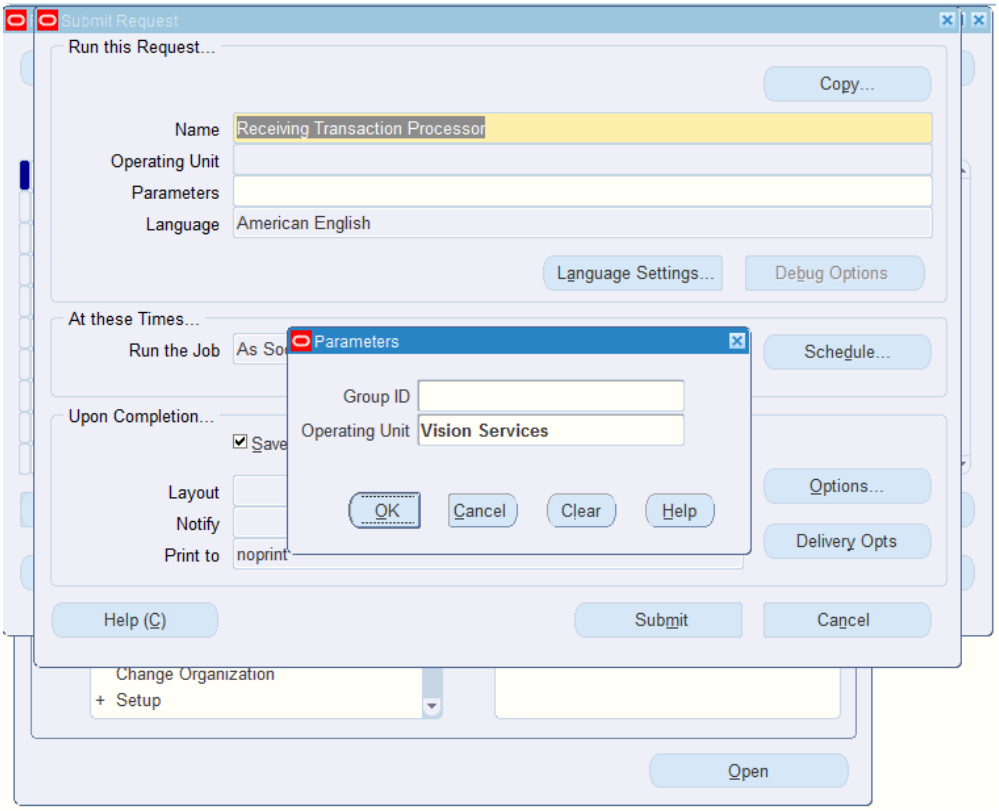
For information about AME, refer to the *Oracle Approvals Management Implementation Guide*.

Processing and Approving Work Confirmations for Complex Work Orders

As a buyer, use the Oracle Purchasing responsibility to process and approve the work confirmation.

To process a confirmation for a complex work order:

1. Navigate to the Submit Request window.



2. Select Receiving Transaction Processor as the concurrent program.

3. Select the operating unit.

4. Click OK and then Submit.

5. Ensure that the concurrent program completes successfully.

When the Receiving Transaction Processor concurrent request completes successfully, navigate to the Worklist to view your notifications. You receive a notification that the work confirmation (Work Confirmation Number) requires your approval. Click Approve to approve the notification.

Work Confirmation 3526WC1 requires your approval

Approve | Reject | Reassign

From: ARA CORBETT
To: Marlin, Amy
Sent: 01-Oct-2015 03:34:48
ID: 6927368

Work Confirmation 3526WC1

Date	01-Oct-2015	Comments	
Period From		Purchase Order	3526
Period To		Description	
Total	20,000.00	Ordered	50,000.00
Currency	USD	Approved	0.00

Line	Pay Item	Description	Need-By Date	UOM	Price	Ordered	Previous Requested/Delivered	Current Amount	Total Progress (%)	Attachments	Comments
1	1	Tear Down Existing Facilities Center	31-Oct-2015 02:00:00			20000	0	20000	100		

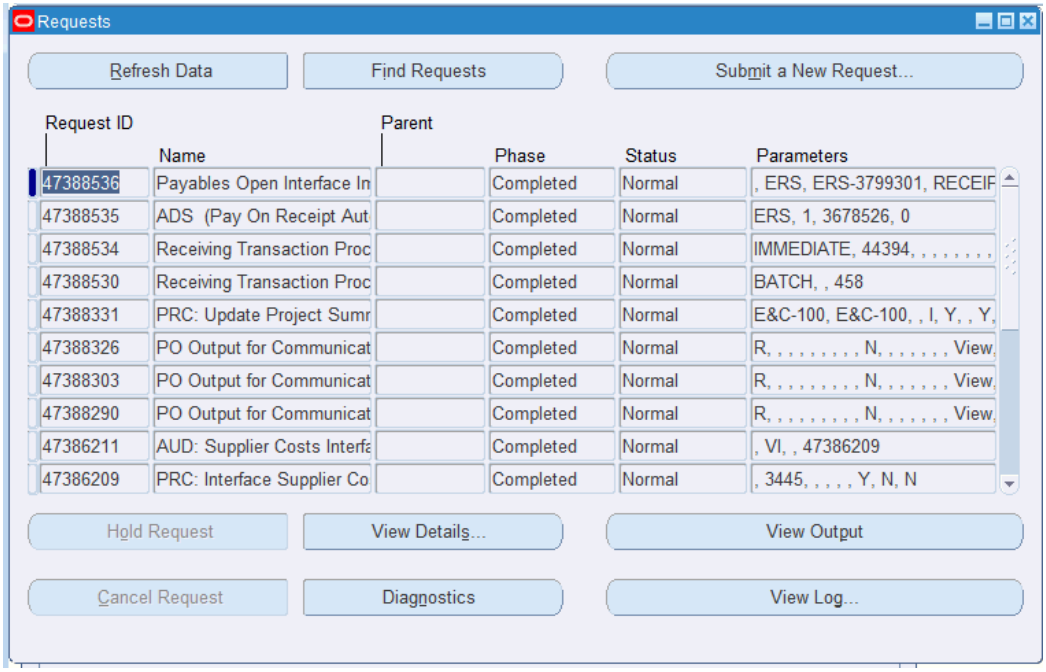
Approval Sequence

Num	Name	Organization	Action	Action Date	Note
0	Corbett, Ara	TT Services	Submitted	01-Oct-2015 03:34:48	
1	Marlin, Ms. Amy	Vision Services	Pending		

Related Applications

View and Respond to Work Confirmation

At this point the concurrent request Receiving Transaction Processor will run again immediately after the notification is approved. This creates a receipt number for the work confirmation. After the Receiving Transaction Processor run is complete, the concurrent program Pay On Receipt Autoinvoice will run and spawn a related concurrent request called Payables Open Interface Import to generate the invoice. Make sure that all the concurrent requests finish successfully. Use the View Request window to verify all complete normally.



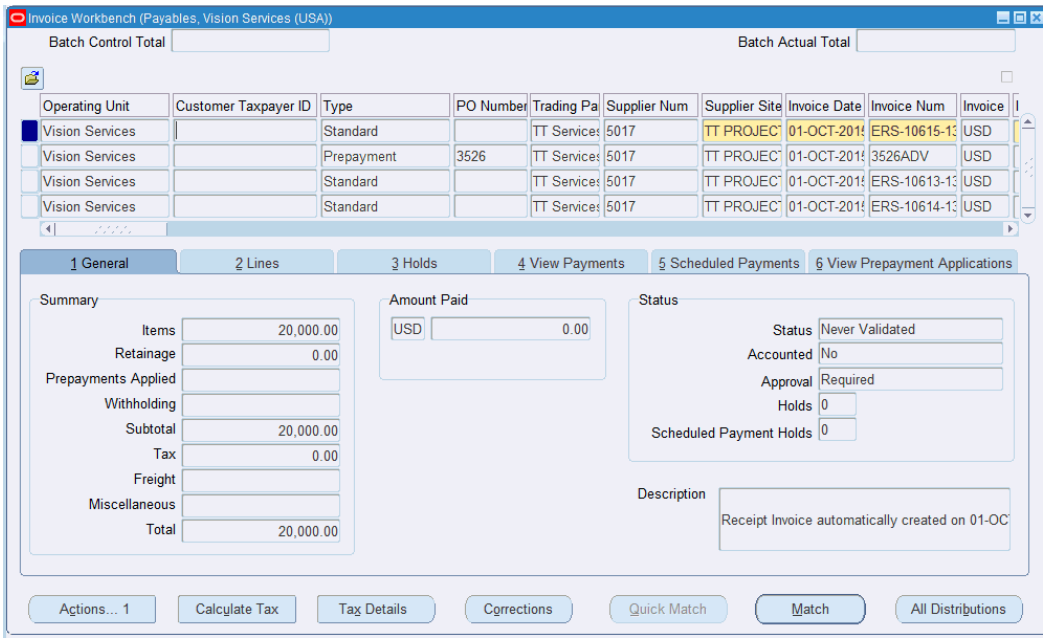
Depending on the setup for the supplier, an invoice is auto generated for the pay item, provided the Work Confirmation is approved.

For more information on work confirmations, refer to the *Oracle iSupplier Portal User's Guide*.

Transferring the Invoice Details of a Complex Work Order to Oracle Projects

The PRC: Interface Supplier Costs concurrent request uses the predefined transaction sources for supplier costs to import transactions from Oracle Purchasing and Oracle Payables. Run this request to transfer invoice details of a complex work order to Oracle Projects.

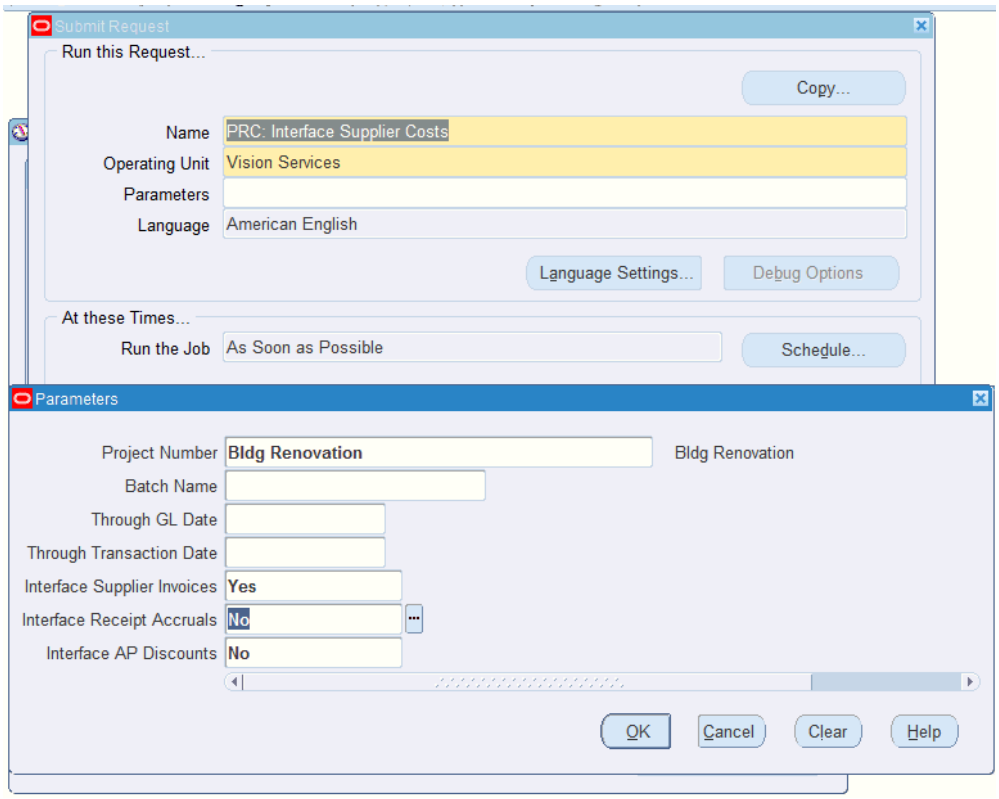
Before you transfer invoice details to Oracle Projects, use the Invoices Workbench window in Oracle Payables to process the invoice so that the invoice details can be transferred to Oracle Projects.



To transfer invoice details of a complex work order to Oracle Projects:

1. Log in to Oracle Projects using an appropriate Project Manager responsibility.

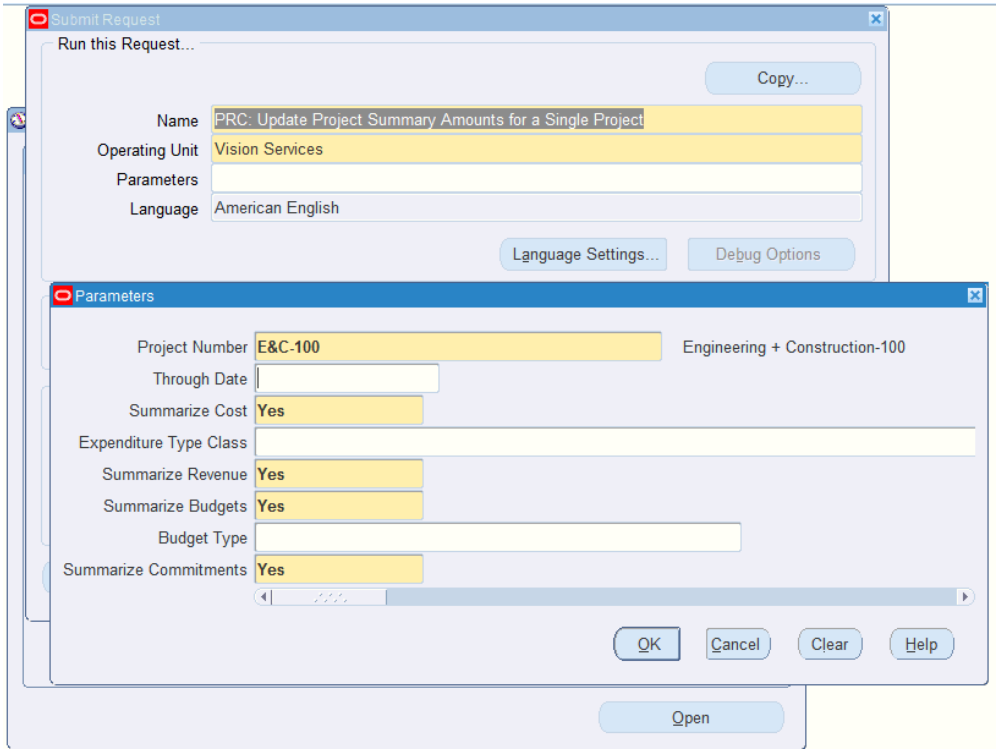
2. Run the PRC: Interface Supplier Costs concurrent program by using the menu option View > Requests (B) Submit a New Request > (B) OK.



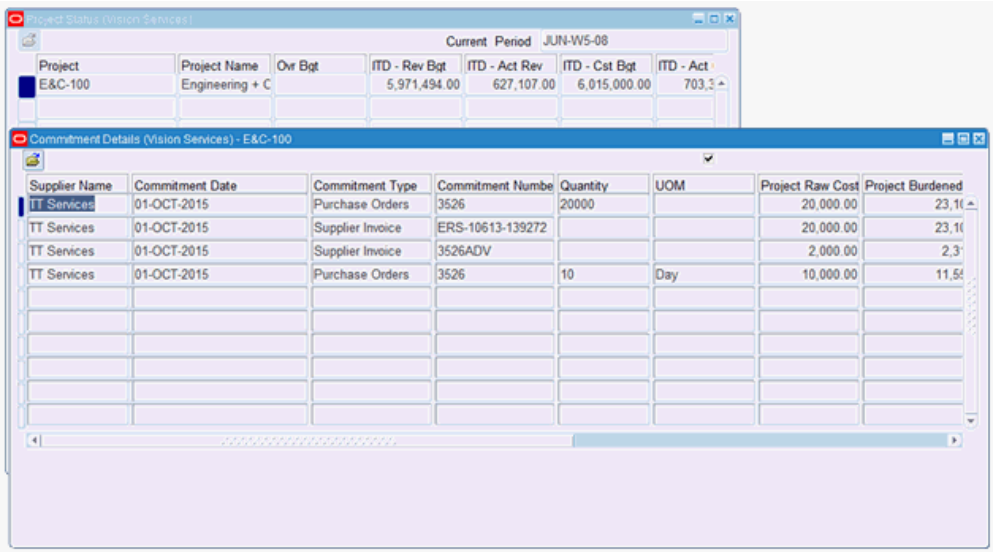
This concurrent program transfers the invoice details to Oracle Projects where the project manager can review the project status.

To update the Project Status Inquiry (PSI):

1. Submit the PRC: Update Project Summary Amounts for a Single Project request.



2. Enter the parameters:
   - Project Number
   - Through Date (LOV) – optional
   - Summarize Costs – Yes (default)
   - Expenditure Type Class – optional
   - Summarize Revenue – Yes (default)
   - Summarize Budgets – Yes (default)
   - Budget Type – optional
   - Summarize Commitments – Yes (default)
3. Submit the concurrent program and ensure it completes successfully.
4. Review the project in the Project Status Inquiry window.



For more information, refer to the *Oracle Projects Fundamentals Guide*.

Tracking the Progress of a Project

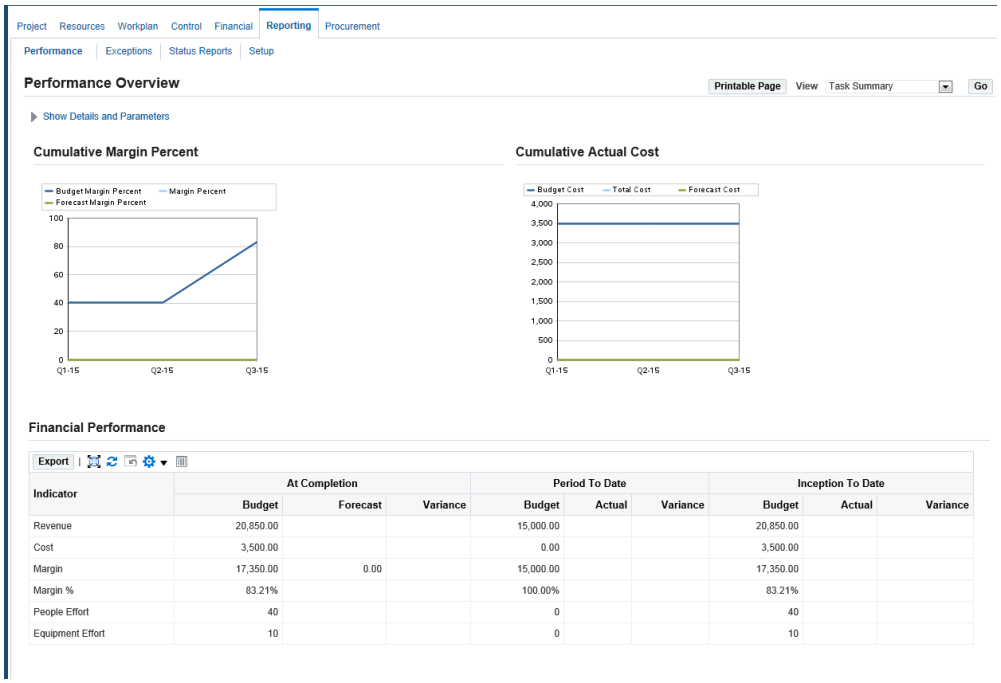
This topic discusses how project managers can track the progress of their projects for complex work using Oracle Projects and Oracle Payables.

Tracking the Project Progress Using Oracle Projects:

Using Oracle Projects, a project manager can track:

- The progress, deliverables, projections and actuals across the entire project.
- The matched and unmatched prepayments as commitments in Oracle Projects.

1. Log in to Oracle Projects using the Project Manager responsibility and search for the project for which you want to track progress.
2. View the Project home page. This page displays actual versus commitments for the entire project.



Oracle Projects enables project managers to perform summary inquiries that include commitment information by task or by resource.

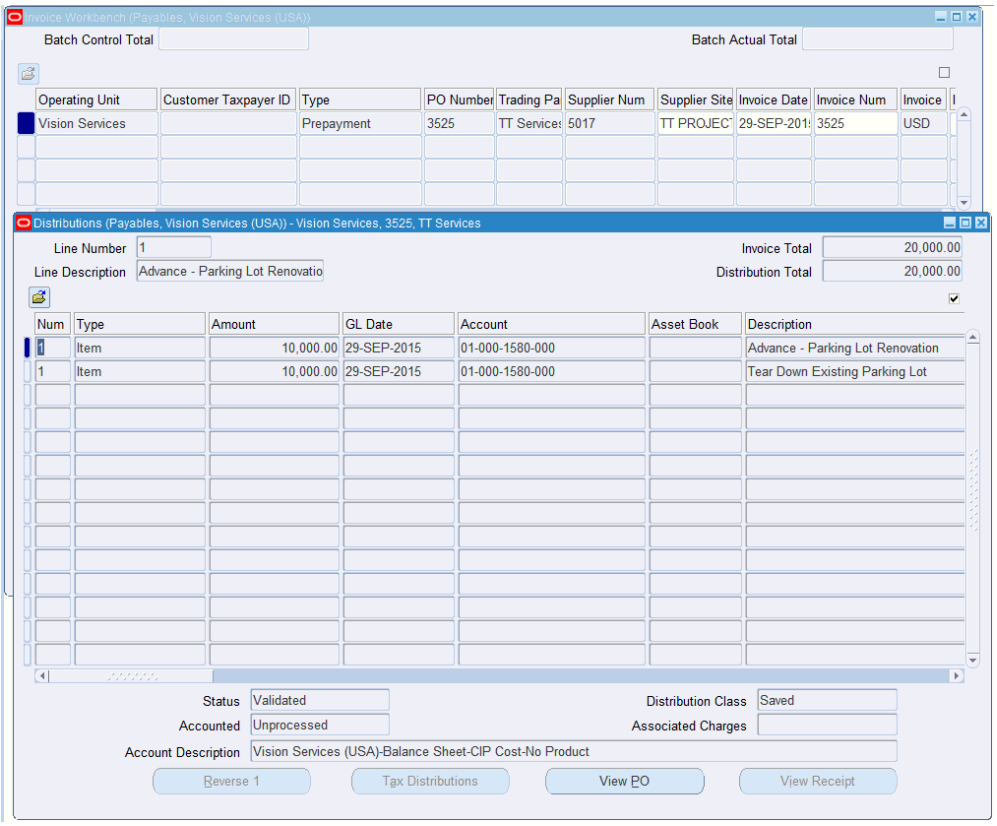
The project manager can drill down to the various Purchasing / Payables commitments. Tracking progress enables a project manager to view the progress of the project for all activities including multiple complex service procurement cycles.

To view summary inquiry by task or by resource, click the Reporting tab.

Tracking the Project Progress Using Oracle Accounts Payables:

After the work confirmation submitted by the supplier using Oracle iSupplier Portal is approved, Pay on Receipt allows automatic creation of standard invoices for payment of goods or services based on receipts or approved work confirmation transactions.

1. Log in to Oracle Accounts Payables using the Payables responsibility.
2. Navigate to the Invoice Workbench window (Invoices > Entry > Invoices).
3. View the summary of the invoice.



The Payables clerk can view the prepayment applications in detail by selecting the View Prepayment Applications tab. The Detailed invoice line information is found in the Lines tab, and view distributions by clicking All Distributions.

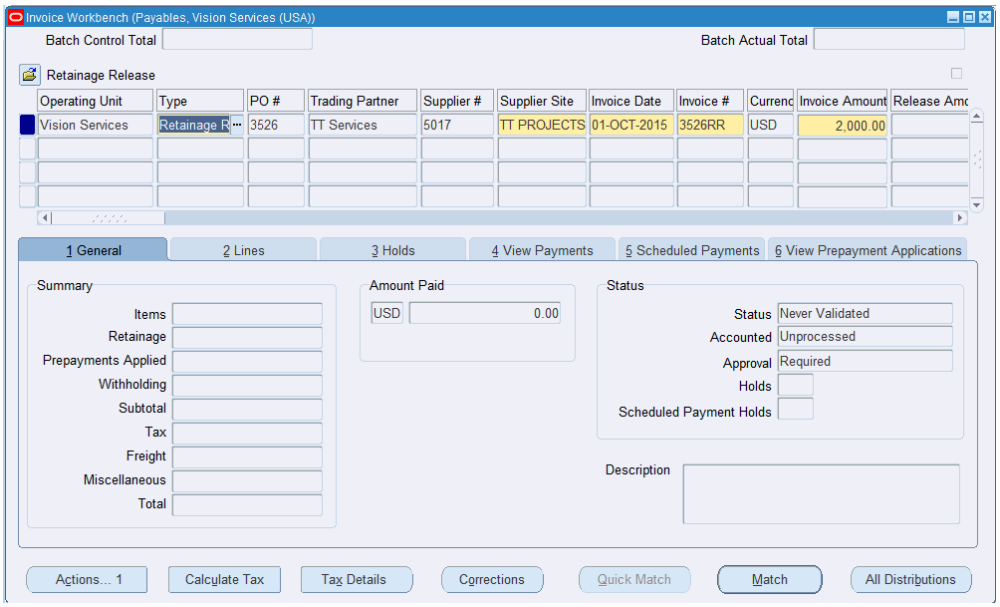
Releasing the Retained Amount

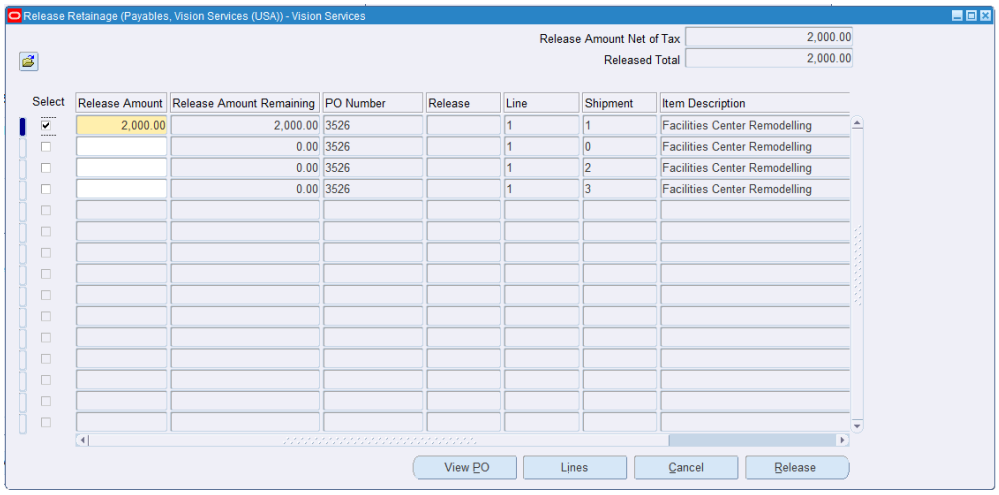
Using the Oracle Accounts Payables, Retainage Release feature, the Payables clerk can release the retained amount using 'Retainage release' invoice type to record this unique transaction. The Retainage release invoice is matched to previously withheld amounts so as to ensure that the released amount can never be more than the originally retained amount. The retainage liability account is finally cleared and payment is made after it is approved.

To release the retained amount:

1. Log in to Oracle Accounts Payables using the Payables responsibility.
2. Navigate to the Invoice Workbench window (Invoices > Entry > Invoices).
3. Create the invoice for the retainage release amount.

4. Make sure that the type is Retainage Release.





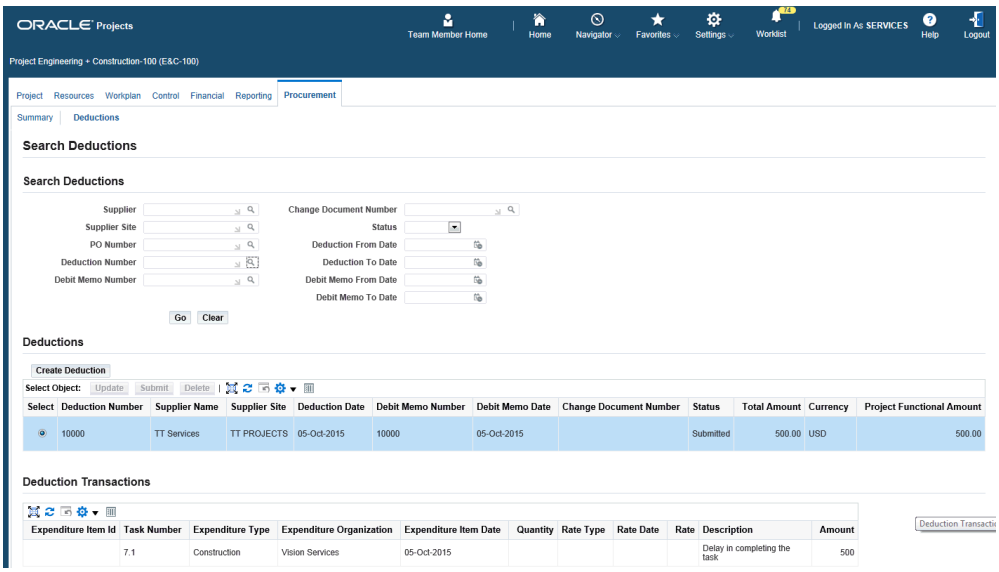
Processing Deductions and Back Charges

The project manager deducts the amount from payment made to a supplier as a penalty for damage or delay to scheduled work. A deduction is submitted for approval after it is created. When the deduction is approved, Oracle Projects sends the deduction to Oracle Payables which creates a debit memo.

Deductions may or may not be associated with a change document. Project managers create deductions when there is a high-value amount and the change document needs to be updated to reflect this amount.

To process deductions and back charges:

1. Log in to Oracle Projects using the Project Manager responsibility.
2. Navigate to the Projects Home page.
3. Click the Supplier tab and then the Deductions subtab.
4. Search for existing deductions or create a deduction.



Processing Change Management and Requests

The project manager can create a change request to plan for and document potential changes to the scope of a project and facilitate its approval. Using a change request, the project manager estimates changes to a project's cost or revenue financial plans by entering and tracking potential changes in cost transactions.

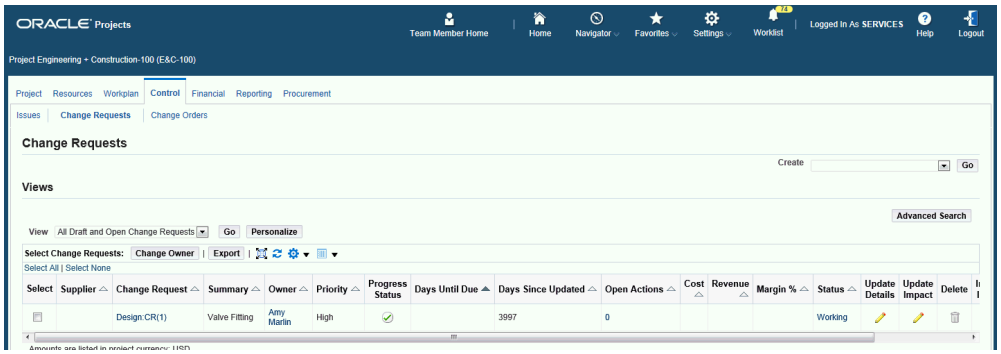
A change request may also have work plan, staffing, contract, supplier and other impacts. Impacts enable the project manager to define and quantify the effect of a change to the scope of a project. When a change request is approved, the project manager can include the change request in a change order to implement the impacts. Including a change request in a change order closes the change request.

To process change management and change requests:

1. Log in to Oracle Projects.
2. Navigate to the Projects home page.

3. Click the Control tab. You can view the Change Requests subtab.

4. Use the Change Requests page to process change requests for your project.



Processing Change Management and Orders

A change order enables the project manager to track and implement the impacts of changes to a project. As with change requests, the project manager uses the change order to plan for project changes by estimating changes in cost transactions and summarizing them as budget impacts.

A change order may also have work plan, staffing, contract, supplier, and other impacts. The project manager merges the impacts of multiple change requests into a single change order. When the change order is approved, users can update the project with the changes. The project manager then analyzes the influence on financial reports due to the requested changes.

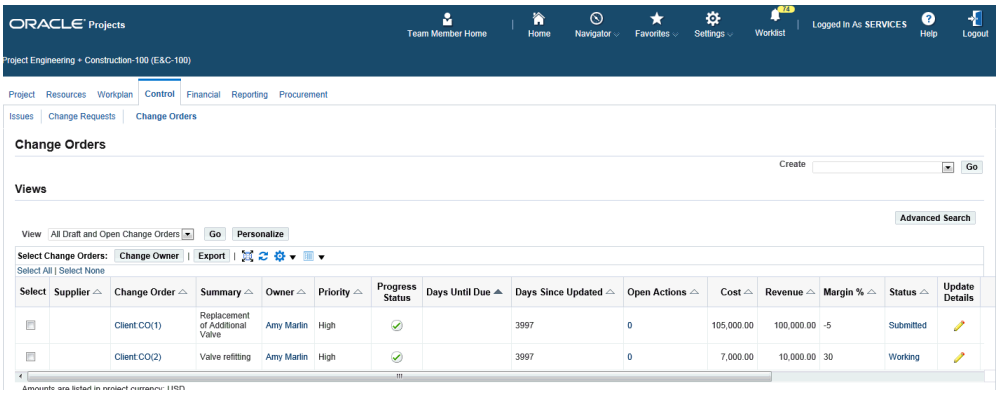
To process change management and change requests:

1. Log in to Oracle Projects.

2. Navigate to the Projects home page.

3. Click the Control tab. You can view the Change Orders subtab.

4. Use the Change Orders page to process change orders for your project.

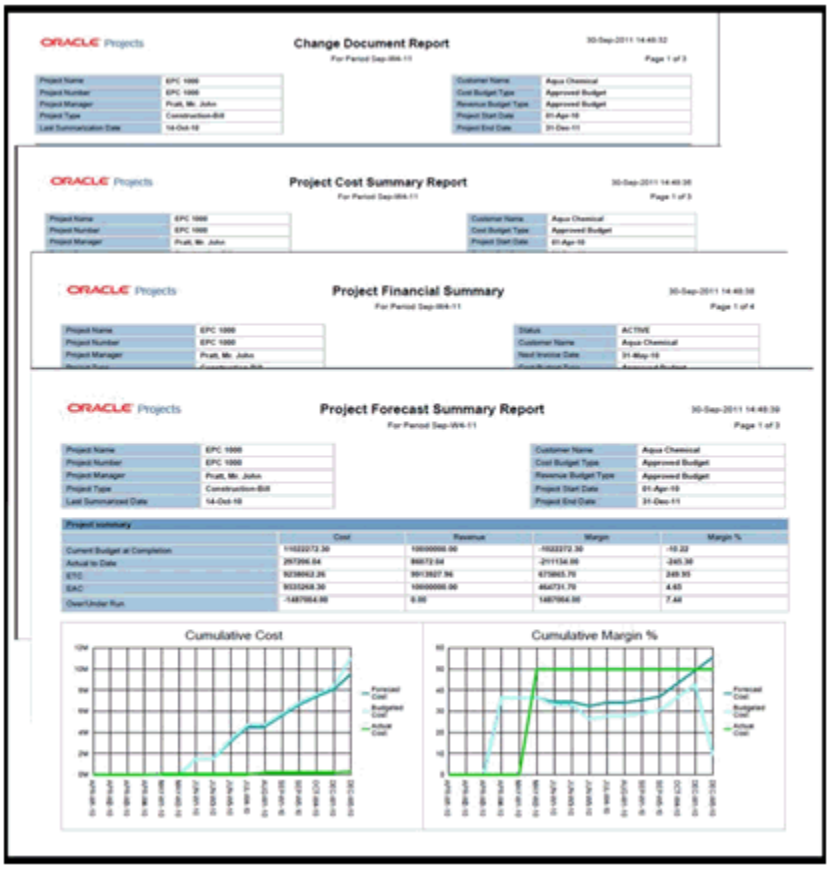


Reporting Analytics for a Project

Project performance management enables project managers to track and monitor financial and schedule related performance for projects. The project manager can also track and monitor schedule related performance for programs.

Project performance reporting provides the project manager with a graphical and tabular overview of performance. The project manager can view performance summaries by project, task, resource, and time online or receive this information as reports in a reporting pack sent as e-mail attachments.

Project performance reporting enables project managers to understand the sources of variances and make key business decisions to ensure that projects are completed on time and according to financial plans.


ORACLE Projects
Change Document Report
ORACLE Projects
Project Cost Summary Report
ORACLE Projects
Project Financial Summary
ORACLE Projects
Project Forecast Summary Report
Cumulative Cost
Cumulative Margin %

4

Processing the Procurement of Contingent Workers

This chapter covers the following topics:

- Overview of Processing Contingent Worker Procurement
- Creating Requisitions for the Procurement of Contingent Workers
- Assigning a Contractor to a Contingent Worker Requisition
- Creating a Purchase Order for a Service Request
- Creating Contingent Worker Timecard
- Approving the Contingent Worker Timecard
- Viewing the Purchase Order Details as a Supplier
- Importing Timecard Data into Oracle Purchasing to Create an Invoice
- Importing Contingent Worker Timecards into Oracle Projects
- Processing Contingent Worker Timecards in Oracle Projects
- Reviewing the Contingent Worker Labor Costs
- Spot Buy using Contractor Requests

Overview of Processing Contingent Worker Procurement

This topic provides an overview of the tasks in the procurement of contingent worker processing. Since contingent worker procurement processing requires integration between several Oracle Applications, the following table lists the sequence of tasks, Oracle Application to perform the task and the functional user who performs the task.

Sequence No.	Task	Oracle Application	Typical Functional User
1	Creating Requisitions for Procurement of Contingent Workers	Oracle iProcurement	Project manager/Requester
2	Assigning a Contractor to a Contingent Worker Requisition	Oracle iProcurement	Project manager/Requester
3	Creating a Purchase Order for a Service Request	Oracle Services Procurement	Buyer
4	Creating Contingent Worker Timecard	Oracle Time and Labor	Contingent Worker
5	Approving the Contingent Worker Timecard	Common Application	Project manager
6	Viewing the Purchase Order Details as a Supplier	Oracle iSupplier Portal	Supplier
7	Importing Timecard Data into Oracle Purchasing to Create an Invoice	Oracle Services Procurement	Buyer
8	Importing Contingent Worker Timecards into Oracle Projects	Oracle Projects	Project manager
9	Processing Contingent Worker Timecards in Oracle Projects	Oracle Projects	Project manager
10	Reviewing Contingent Worker Labor Costs	Oracle Projects	Project manager/Requester

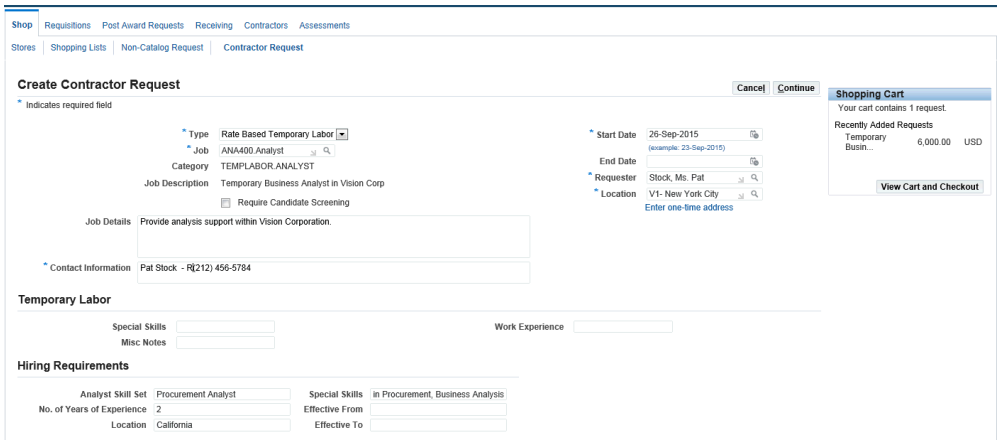
Creating Requisitions for the Procurement of Contingent Workers

Oracle iProcurement requisitions temporary labor using contractor requestions. Use the Create Contractor Request page to create requisitions for rate-based or fixed price temporary labor line types. Create a contractor request to hire temporary labor, including contractors and temporary personnel.

To create a requisition for a contingent worker:

1. Log into Oracle iProcurement using the iProcurement responsibility.

2. In the iProcurement Home, click the Contractor Reuest subtab. The Create Contractor Request page appears.



3. Enter Contractor Request Details

   - Enter the line type (Rate Based Temporary Labor and Fixed Price Temporary Labor are the supported line types).

     - Rate Based, such as 40 USD per hour

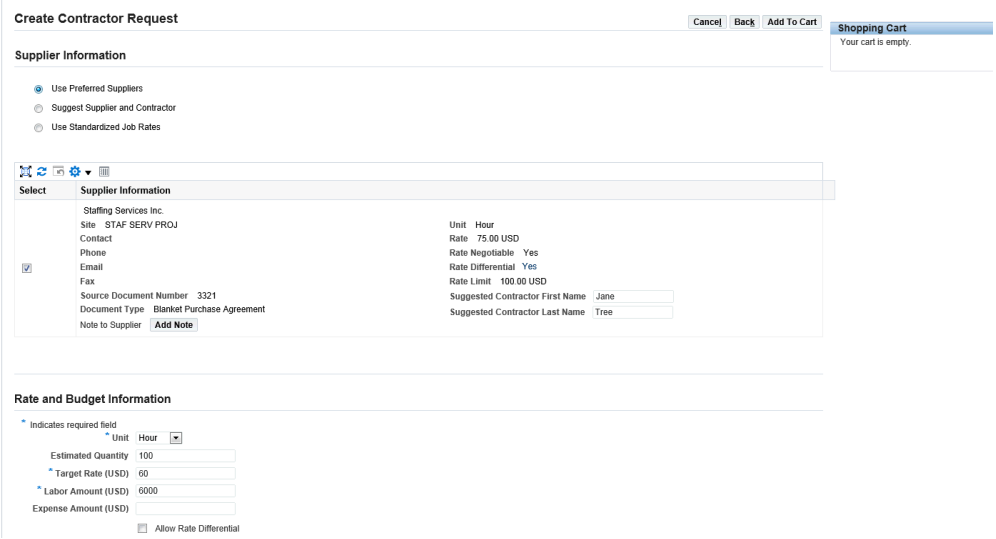
     - Fixed Price, such as 50,000 USD for the labor

   - Enter details such as the Job (for example, ENG400.Engineer), start date, end date, requester and contact information. Note: When you select a job in the Create Contractor Request page, the application checks the shopping category associated to the specified job. If descriptors are defined for the job, then the application displays the descriptors associated to the shopping category in a separate region. If the requisition line has 'Descriptors' associated to it and when the requisition is converted into an RFQ document with the outcome as 'Blanket Purchase Agreement', then the 'Descriptors' from the requisition line are copied on to the RFQ line. If a negotiation is created for a temporary labor and if there are descriptors associated to the negotiation line based on the Job-Purchasing Category – Shopping Category combination, then the supplier can view the 'Descriptors' during the Quote process. The supplier should be able to respond to the descriptors on a rate based negotiation line.

   - Use the Require Candidate Screening check box to contact the supplier and review/verify candidate (contingent worker) resumes, requirements, and other details for the job. This activity is not captured in the system, however,

complete the activity before the purchase order is created. If you select this check box, then the requisition status is 'Approved Pending. Assign a contractor after the requisition is submitted and approved, but before the purchase order is created. This is commonly referred to as the Skilled temp labor flow since it requires the buyer to review a worker along with the supplier, and is usually performed for skilled laborers (engineers, nurses, etc) as opposed to unskilled labor (admin, clerk).

4. Enter the Supplier Information



- By default the Use Preferred Supplier radio button is selected and the preferred supplier information is displayed. Approved suppliers for this job category are found in the Approved Supplier List in Oracle Purchasing and are displayed to the requester on this page. If a long-term agreement (Global Blanket Purchase Agreement) also exists for the supplier, the pre-negotiated rates are displayed on this page.

- If you wish to select another supplier (other than the one suggested by the system), select the radio button Suggest Supplier and Contractor. Note that you will need to manually create a purchase order for that supplier for the requisition.

- Optionally, multiple suppliers may be displayed on this page if there are multiple suppliers specified on the Approved Supplier List for this job. Select the check box for one supplier only.

- If you select the 'Use Standardized Job Rates' option, then application displays the rate information for the selected job based on the job attributes that you select.

- Enter a Suggested Contractor First and Last name if you have the details with you.

5. Enter Rate and Budget Information

   The Rate and Budget Information region enables you to enter the rate, quantity and unit for the contingent worker. Using the rate and budget information, requesters and buyers ensure the correct rate and wage calculation for the contingent worker. For example, enter 10 days of labor at a target rate of 50 USD per day where the Unit is Day.

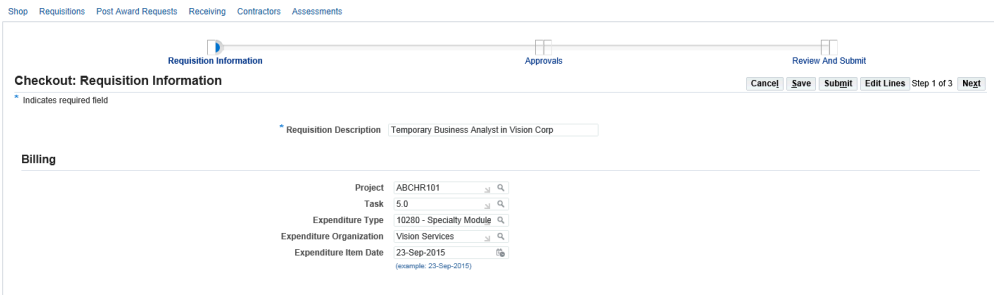
   - Unit: measure of the payment (for example, week, day, month, quarter, hour).
   - Estimated Quantity: 10
   - Target Rate (USD): 50
   - Labor Amount (USD): 500 (typically Estimated Quantity * Target Rate, however, this formula is not mandatory)
   - Expense Amount (USD): 100 (for example, amount allowed for meals or mileage)
   - Allow Rate Differential: Select this option to allow overtime pay.
   - Exchange Rate Type
   - Exchange Rate Date
   - Exchange Rate

   In the Supplier Information region, if you select the options Use Preferred Suppliers or Use Standardized Job rates, the fields pertaining to transaction (foreign) currency are not displayed.

6. Click Add to Cart to continue the requisition creation process for contingent labor. When you click Add to Cart, the Shopping Cart page appears.

7. If you need to update any information that you may have mistyped or missed out, then click the Edit (pencil) icon to edit the details. Click Continue to return to the Shopping Cart page and click Checkout.

   The Checkout: Requisition Information page enables you to enter the project information to associate the contingent worker to a project in Oracle Projects.



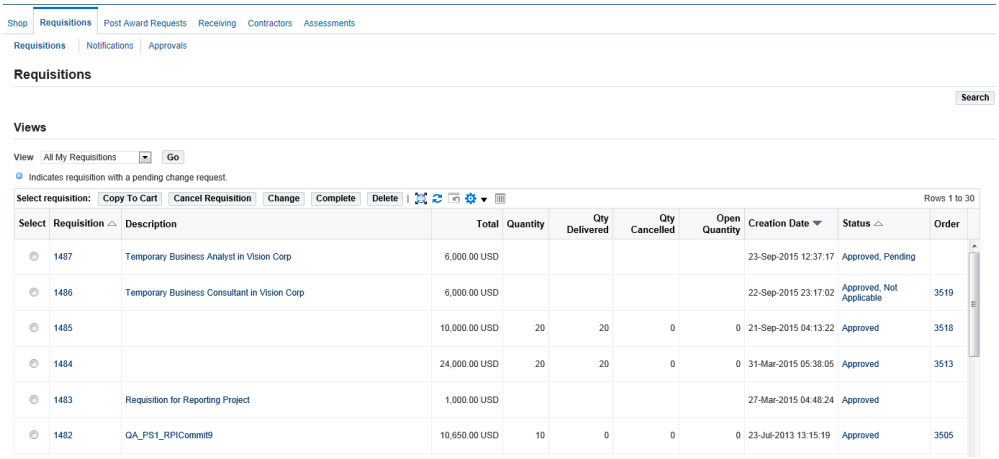
8. Click Next to view and update the Checkout: Approvals and Notes page.

9. Review Approval Details

   You can add ad-hoc approvers using the Manage Approvals button. You can also add attachments to the contingent worker information.

   The Checkout: Review and Submit Requisition page enables you to review the contractor requisition and then submit it for approval.

   To check the status of the submitted requisition, click the Requisitions tab or the Contractors tab or the home page.



If the requisition has an Approved, Not Applicable status, then a standard purchase order is created based on the requisition information, GBPA and ASL. If you entered a supplier using the Suggest Supplier and Contractor (different from the preferred suppliers), then navigate to the Autocreate window or page in Oracle Purchasing to create a purchase order from the requisition information.

- If the status of the requisition is Approved, Not Applicable, then it implies that the requisition does not require additional steps to assign a contractor.

- If you had selected the Required Candidate Screening check box, entered a rate that is different from the Global BPA, or selected multiple suppliers, then the

status of the requisition shows as Approved, Pending. With this status, you would then need to Assign Contractor, which enables you to select the source for this requisition line.

Approved requisitions are automatically generated into POs using the Automatic Document Creation Engine embedded in Oracle Purchasing or the buyers can manually create the Purchase Orders.

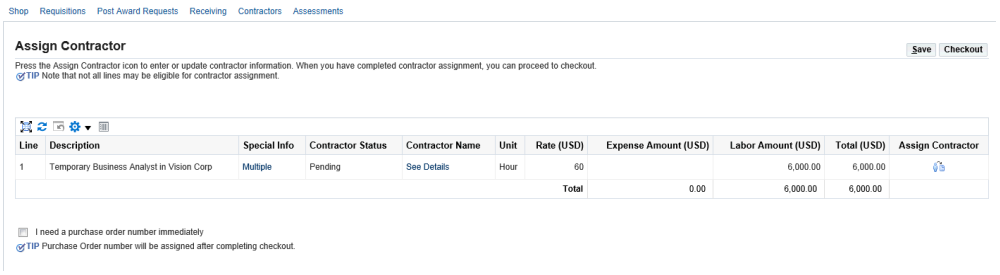
Assigning a Contractor to a Contingent Worker Requisition

This step is required if you checked the "Require Candidate Screening" box for the "skilled" labor flow. Also if you changed the rate from what defaulted. This topic assumes the buyer has contacted the supplier to review possible workers and decided on a specific worker, which must now be added to the requisition before a Purchase Order is created.

> **Note:** The status of your requisition will be 'Approved, Pending' if you checked the Require Candidate Screening check box.

To assign a contractor to a contingent worker requisition:

1. Log in to Oracle iProcurement using the appropriate iProcurement responsibility.
2. Navigate to the iProcurement Home page.
3. In the 'My Requisitions', click the requisition link to see the requisition details. Notice the Contractor status is pending and there is no purchase order created against the submitted requisition.
4. Click Assign Contractor.



5. In the Assign Contract Column, select a contractor. Optionally, if you had selected multiple suppliers on page 2 of contractor request (Supplier Information page), you have to select one supplier on this page.

   This process requires the requisition to be re-submitted because of changes made to

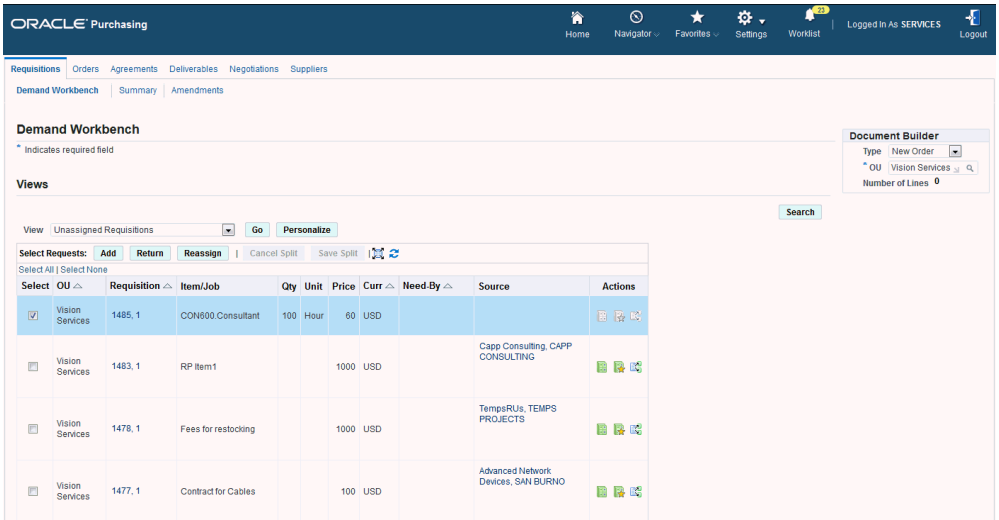
requisition due to worker name addition. If the requisition is automatically approved, then the status is Approved, Assigned.

Creating a Purchase Order for a Service Request

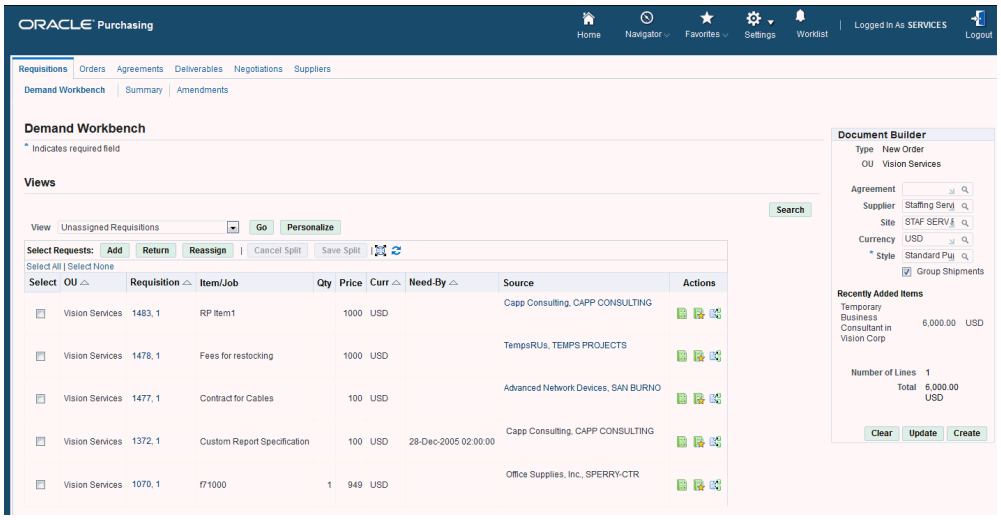
During the requisition creation process, if you select the Suggest Supplier and Contractor option, then you must create a standard purchase order manually for that particular requisition.

To create a purchase order for a service request:

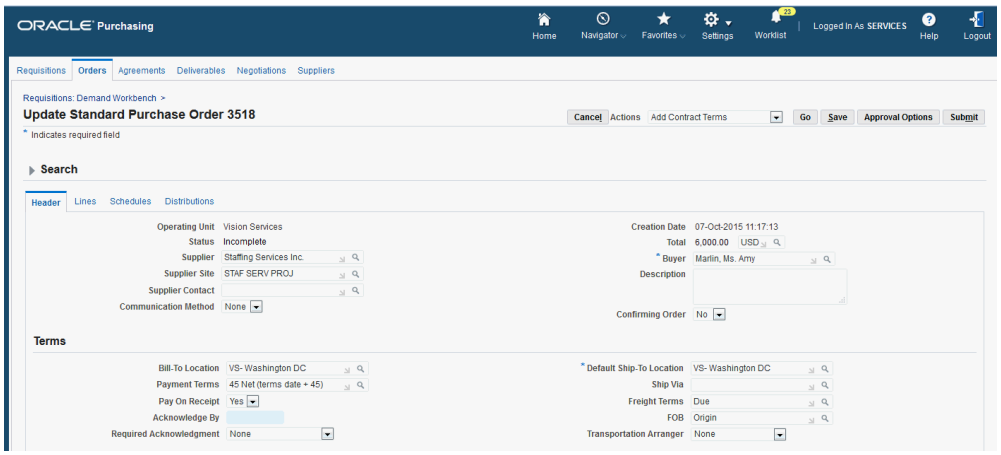
1. Log in to Oracle Purchasing.
2. Navigate to the Demand Workbench page using Buyer Work Center.
3. Search for your requisition created for the procurement of the contingent worker.
4. Select the requisition and click Add.

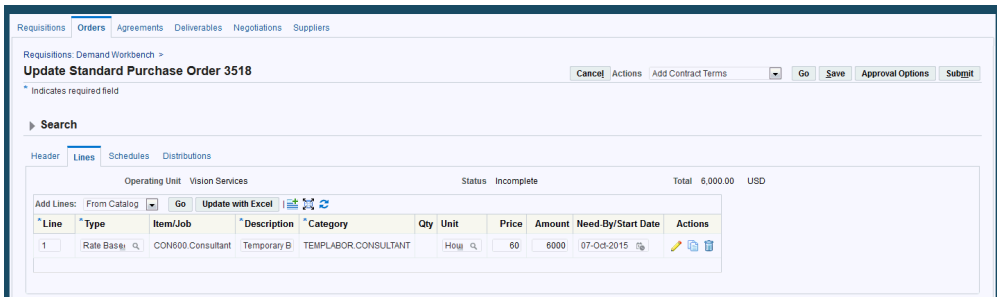


5. Select the supplier and site in the Document Builder region and click Create.



If you are creating a purchase order from a requisition, then the header and line details default from the requisition.





6. Enter Purchase Order Details

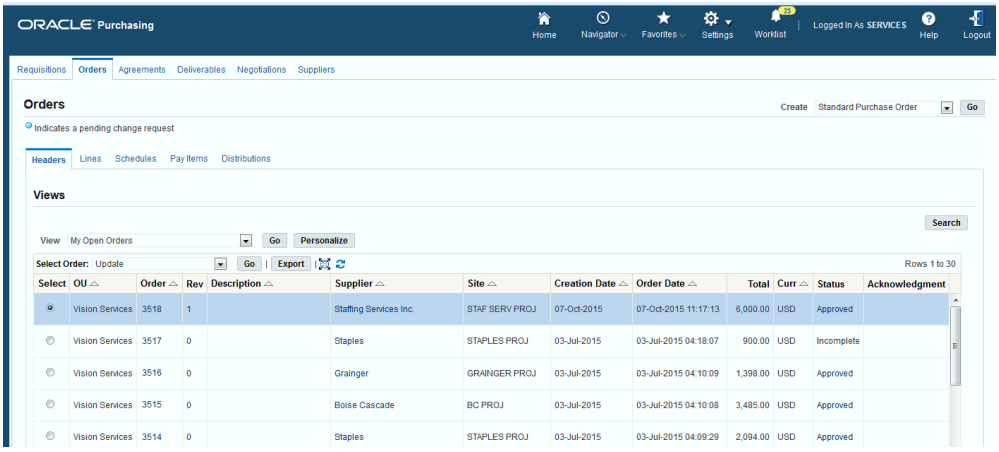
There must be a job already defined in the HR responsibility and associated to a Purchasing category, which you select during the purchase order line creation. The

Start Date for a purchase order line is mandatory. You can add the contractor name.

You can create multiple shipments and distributions with multiple project details. You can associate one project to each distribution line on a purchase order. You can create multiple distributions with the same or different project details.

In the PO Distribution, you can associate a project to the particular distribution line. The account generation will happen based on the account generator workflow.

Once the purchase order details are complete, submit the order for approval. The purchase order is approved based on the approvals set in your enterprise.



Creating Contingent Worker Timecard

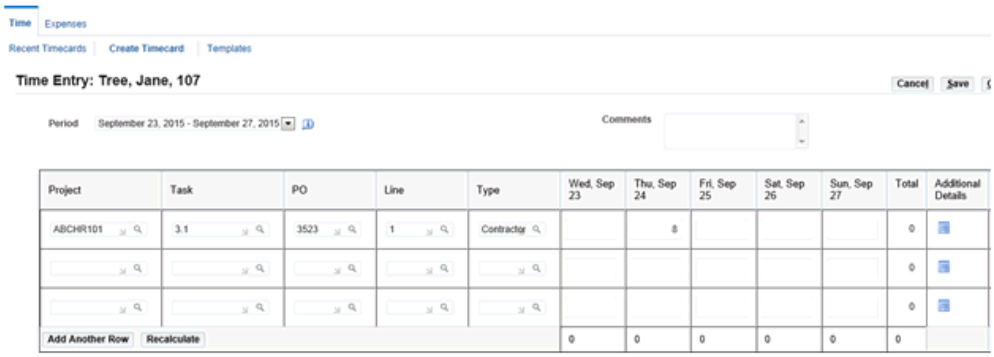
Oracle Time and Labor enables collection, storage, approval, and auditing of time and labor data. Once the purchase order is assigned to the contingent worker, the worker can create a time card for the purchase order selecting the project and purchase order details. They can also create timecard entries or record time for project billing using Oracle Time and Labor.

> **Important:** The timecard layout determines the fields that contingent workers can enter, how the fields are arranged on the page, and the instruction text that they see.

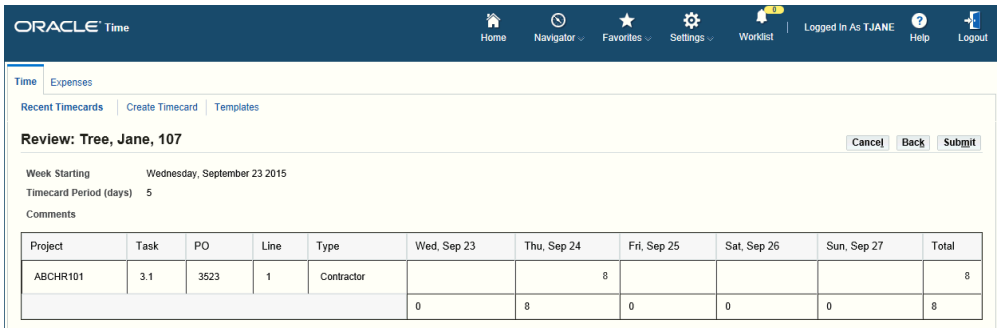
To create a timecard as a contingent worker:

1. Log in to Oracle Time and Labor using the appropriate timecard entry self-service responsibility.

2. Click Create Timecard. The Time Entry page appears.



3. Enter the timecard details such as the project, task, purchase order, purchase order line and expenditure type.
   - Project information is any valid project. It can be the same project from the PO distributions or any other valid project.
   - Project task is dependent on the selected project.
   - PO is the purchase order assigned to the contingent worker. If at least one day of the timecard period falls within the effective start/end dates of the assignment, then the PO is available for selection. The PO must be active.
4. Submit the timecard for approval. The application routes the timecard for approval based on approval rules defined in the system.



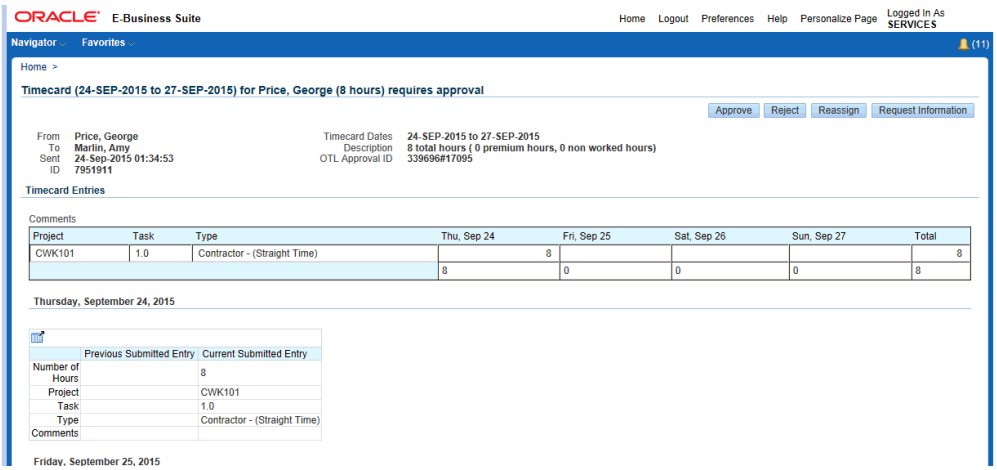
Approving the Contingent Worker Timecard

Project managers approve the contingent worker timecards submitted for approval.

To approve the contingent worker timecard:

1. Log in to the appropriate responsibility that allows you to approve the timecard.
2. View the timecard notification in the Worklist.

3. Click the notification to view the timecard details.



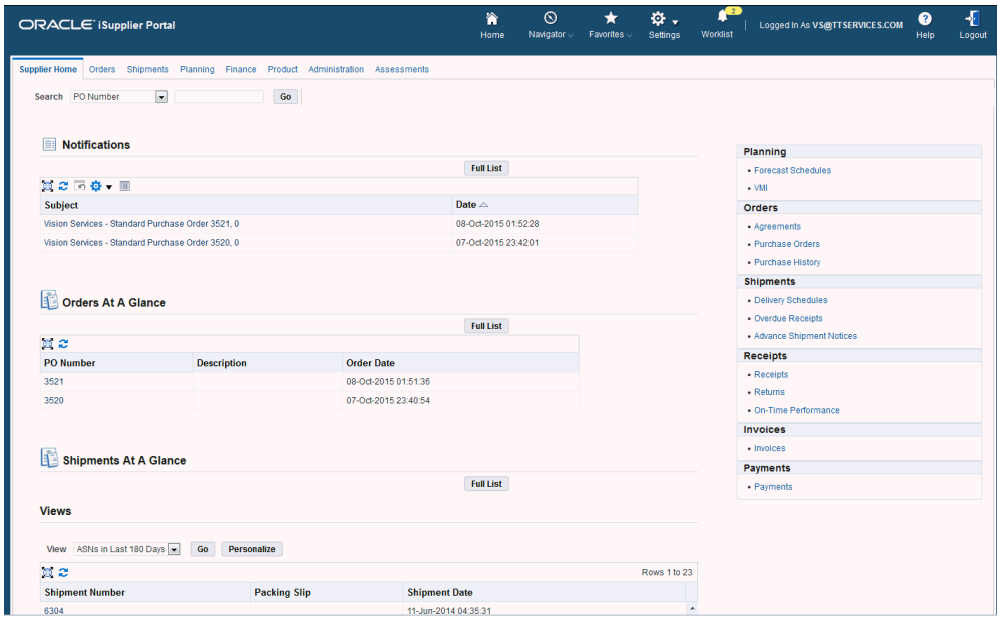
4. Click Approve.

Viewing the Purchase Order Details as a Supplier

Suppliers can view the details of the purchase orders assigned to them using Oracle iSupplier Portal.

To view the purchase order details as a supplier:

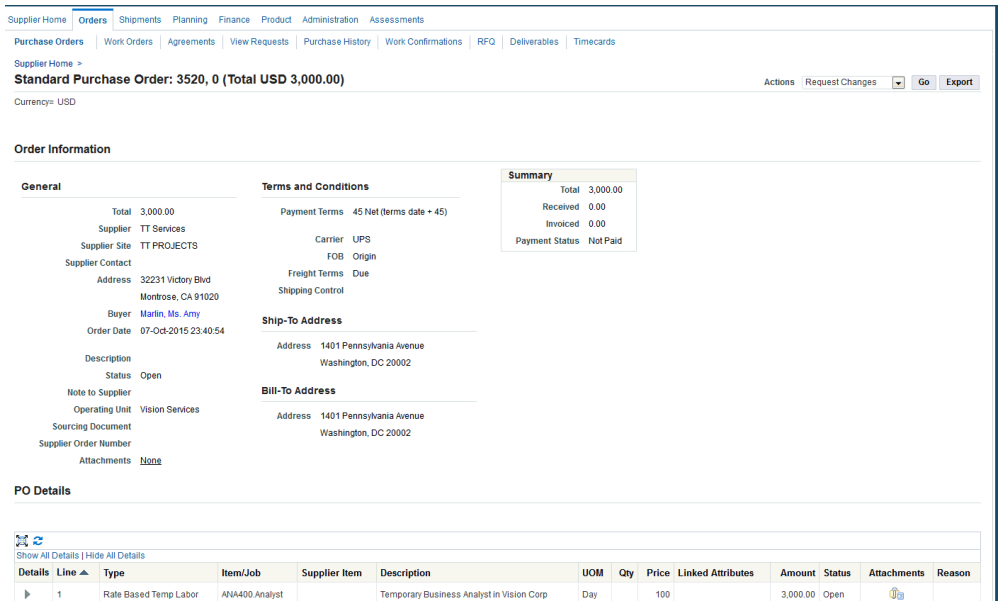
1. Log in to Oracle iSupplier Portal using the iSupplier Portal Full Access responsibility.



The top tabs (Orders, Shipment, Planning, Account, and Product) can be used to drill down into sub-tabs for specific functions. The workflow Notifications are listed at top.

2. In the Orders At a Glance region, click the purchase order to view the purchase order details. The Purchase Order details page appears.

   The 'Summary' box shows the amount received, invoiced, and payment as applicable. This shows a quick view without having to drill down.



During the procurement of contingent worker processing, you can:

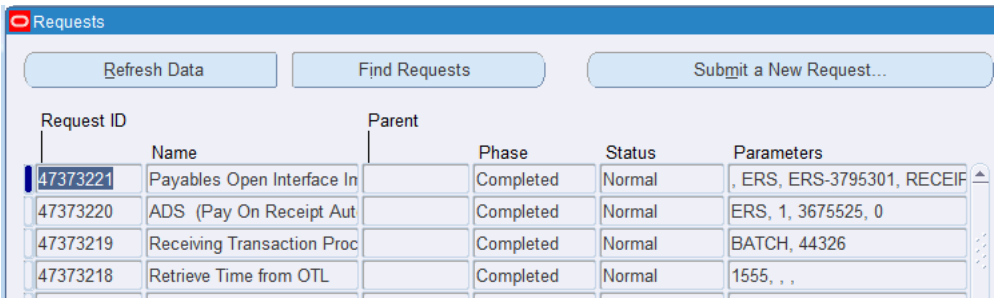
- View the receipt details that were completed for your item.
- View the invoice details that were created against the purchase order.
- Click the payment link to view the Payment number (only if you created a payment against the invoice in Accounts Payables).
- View Timecard for Worker using the Timecards subtab.
- View timecard details to keep track of the contingent workers that are tied to the supplier Purchase Orders.

Importing Timecard Data into Oracle Purchasing to Create an Invoice

After contingent workers' timecards in Oracle Time and Labor are approved, buyers generate the invoice for the recorded time. Run the Retrieve Time from OTL process to import the timecard data into Oracle Purchasing and automatically generate the Payables invoice from the timecard.

To import timecard data into Oracle Purchasing:

1. Log in to Oracle Purchasing using the appropriate Purchasing responsibility.
2. Navigate to the Submit Request window.
3. Select the Retrieve Time from OTL program.



4. In the parameters window, select the supplier, enter the start and end dates, and transaction date to import the contingent worker timecard data.

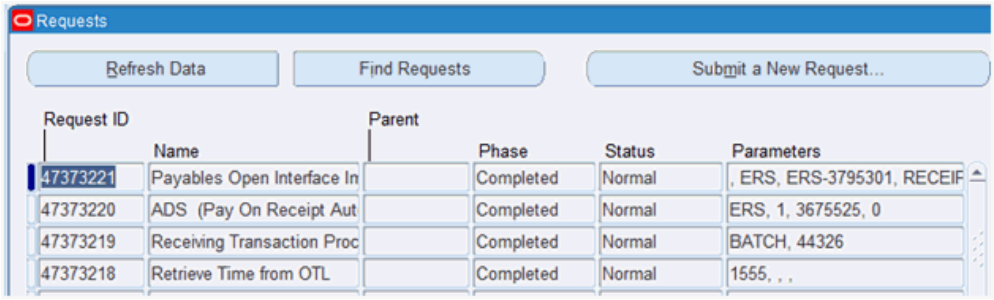
5. Verify that the processes completes without errors.

   The Retrieve Time from OTL submits the following child processes:

   - Receiving Transaction Processor
   - Pay on Receipt Autoinvoice
   - Payables Open Interface Import

   If need be, submit the request "Pay on Receipt Autoinvoice" manually if it does not kick off automatically.

6. Review the output for the "Payables Open Interface Import" request to verify that your invoice is created successfully. You can review the invoice in Payables if required.



To view the invoice for the requisition:

1. Navigate to the Requisition link in the Requisitions tab in Oracle iProcurement.

2. Click link for your requisition. The Requisition Line Details page appears.

3. Scroll to the Invoice region and view the invoice details.

Shop | Requisitions | Post Award Requests | Receiving | Contractors | Assessments

Requisitions | Notifications | Approvals

Contractors: Contractors > Requisition Details >

Requisition 1491 Line 1: Details

Requisition

Description	Temporary Business Analyst in Vision Corp	Current Approver	
Status	Approved	Approver Phone	
Change History	No	Date Sent to Approver	
Header Attachments	None		

Show Additional Information

Order

Order	3523	Status	Approved
Buyer	Marlin, Ms. Amy	Buyer Phone	339-669-0987
Supplier	Staffing Services Inc.	Supplier Site	STAF SERV PROJ
Supplier Contact		Supplier Phone	

Timecard

View Timecard

Rate Type	Rate (USD)	UOM	Total Time	Total Amount (USD)
Standard Rate	60	Hours	8	480.00
			Total	480.00

Invoice

Details	Invoice	Description	Payment Status	Creation Date	On Hold Status	Invoice Amount	Amount Due	Due Date
	ERS-10611-139231	Receipt Invoice automatically created on 24-SEP-15	Not Paid	24-Sep-2015		480.00 USD	480.00 USD	08-Nov-2015

TIP Invoice amounts shown may include items other than the requested item.

Payment

Payment	Status	Payment Date	Payment Amount	Cleared Date	Payment Method	Bank
No results found.						

Shop | Requisitions | Post Award Requests | Receiving | Contractors | Assessments

Requisitions | Notifications | Approvals

Requisitions: Requisitions > View Order Details >

Invoices for Standard Purchase Order: 3523

Export

Invoice	Invoice Date	Type	Supplier	Supplier Site	Currency	Amount	Due	Status	On Hold	Payment Status	Remit-to Supplier	Remit-to Supplier Site	Due Date	Payment	PO Number	Receipt	Attachments
ERS-10611-139231	24-Sep-2015	Standard	Staffing Services Inc.	STAF SERV PROJ	USD	480.00	480.00	In-Process		Not Paid			08-NOV-2015		3523	10611	

Return to View Order Details

Shop | Requisitions | Post Award Requests | Receiving | Contractors | Assessments

Requisitions | Notifications | Approvals

Requisitions: Requisitions > View Order Details > View Invoices >

Standard Invoice: ERS-10611-139231 (Total USD 480.00) Export

Currency= USD

General

Invoice Date	24-Sep-2015
Status	In-Process
On Hold	
Batch	
Attachments	None
Supplier	Staffing Services Inc.
Supplier Site	STAF SERV PROJ
Address	43233 Kensington Rd Los Angeles, CA 90021

Amount Summary

Item	480.00
Freight	0.00
Miscellaneous	0.00
Tax	0.00
Prepayment	0.00
Retainage	0.00
Withholding Tax	0.00
Total	480.00

Payment Information

Paid	0.00
Discount Taken	0.00
Due	480.00
Status	Not Paid
Payment Date	
Payment	
Term	45 Net (terms date + 45)

Invoice Lines | Scheduled Payments | Hold Reasons

Line	Type	Description	Qty	UOM	Price	Tax Included	Amount	Retainage	Status	PO Number	PO Line	PO Shipment	Buyer	Receipt
1	Item	Temporary Business Analyst in Vision Corp		Hour	60.00		480.00	0.00	In-Process	3523	1	1	Marlin, Ms. Amy	10611

Return to View Invoices

To review the contractor information:

Buyers review the contractor information using the Contractor portal in Oracle iProcurement.

1. Log in to Oracle iProcurement using the appropriate iProcurement responsibility.
2. Navigate to the Contractors tab from within the iProcurement Home page.

ORACLE iProcurement | Shopping Cart | Home | Navigator | Favorites | Settings | Worklist | Logged In As SERVICES | Help | Logout

Shop | Requisitions | Post Award Requests | Receiving | Contractors | Assessments

Contractors | Performance

Contractors Create Contractor Request | View Contractor Performance

Views

View Active Contractors Go Search

Name	Job Description	Requisition	Start Date	End Date	Purchase Order	Supplier	PO Amount Billed (USD)	PO Amount Remaining (USD)	View Timecard
Mark Llyod	Temporary Business Analyst in Vision Corp	1491	24-Sep-2015		3523	Staffing Services Inc.	480.00	2,520.00	
Robert Grant	Temporary Business Analyst in Vision Corp	1490	23-Sep-2015		3521	Staffing Services Inc.	0.00	1,800.00	
John Martin	Temporary Business Analyst in Vision Corp	1489	23-Sep-2015		3522	Staffing Services Inc.	0.00	400.00	
Jane Tree	Temporary Business Analyst in Vision Corp	1487	23-Sep-2015		3520	Staffing Services Inc.	0.00	6,000.00	
George Taylor	Temporary Business Consultant in Vision Corp	1486	23-Sep-2015		3519	Staffing Services Inc.	0.00	6,000.00	
	Temporary Business Consultant in Vision Corp	1473	02-Jan-2007		3486	Staffing Services Inc.	0.00	600.00	
Richard Madison	Temporary Business Consultant in Vision Corp	1436	30-Aug-2006		3449	Staffing Services Inc.	18,000.00	0.00	
Stephanie Markum	Temporary Business Consultant in Vision Corp	1263	08-Jun-2005		3327	Staffing Services Inc.	60,000.00	0.00	

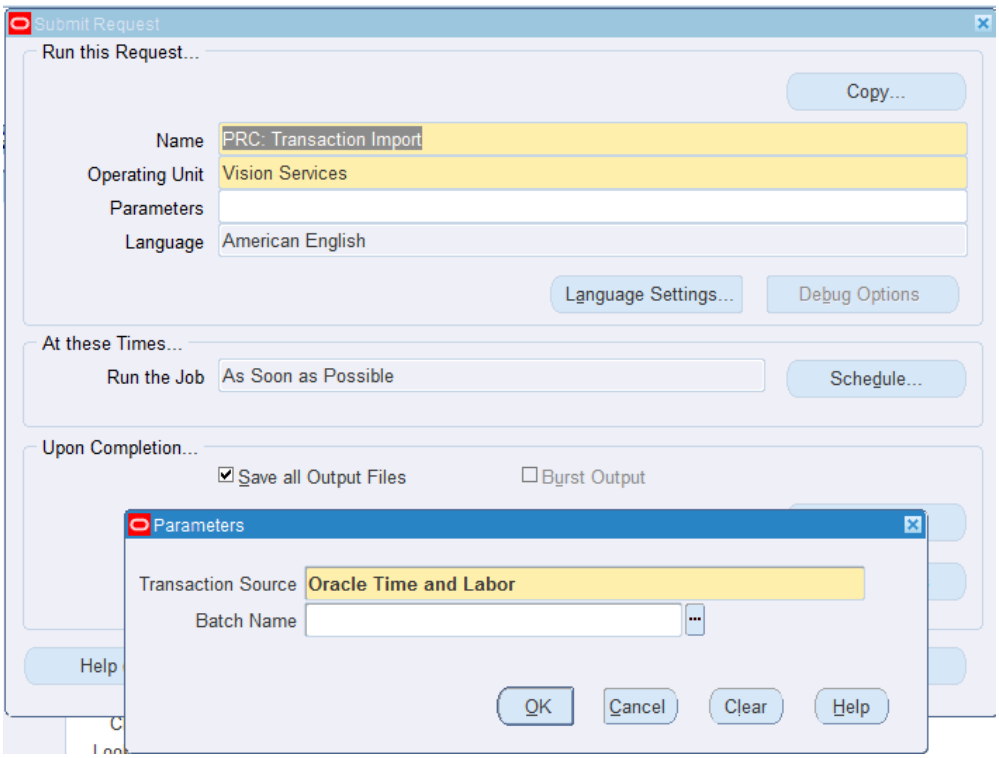
Importing Contingent Worker Timecards into Oracle Projects

When the timecards are ready for retrieval, run the process PRC Transaction Import to transfer timecards from Oracle Time and Labor to Oracle Projects. This process transfers timecards that belong to contingent workers with Oracle Projects in their application set

and retrieval rule group, and that meet the retrieval rules for Oracle Projects.

To import timecard data into Oracle Projects:

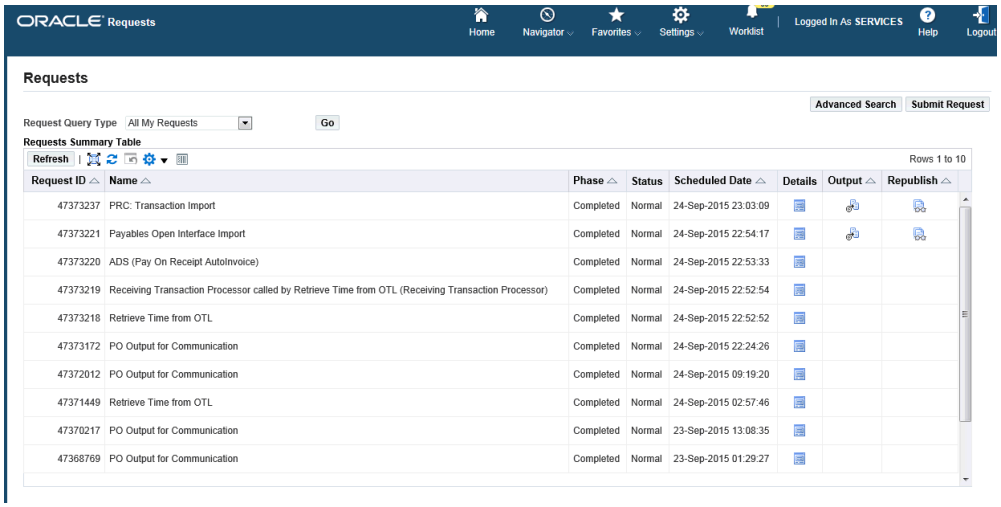
1. Log in to Oracle Projects using the appropriate Projects responsibility.
2. Navigate to the Submit Request window.
3. Select PRC Transaction Import.



4. Select Oracle Time and Labor for the Transaction Source parameter and leave the Batch Name parameter blank.

To review the request:

1. Navigate to the Requests page (Projects > Requests > Monitor).
2. Monitor the progress of the request processing. Verify that the process completes without error.

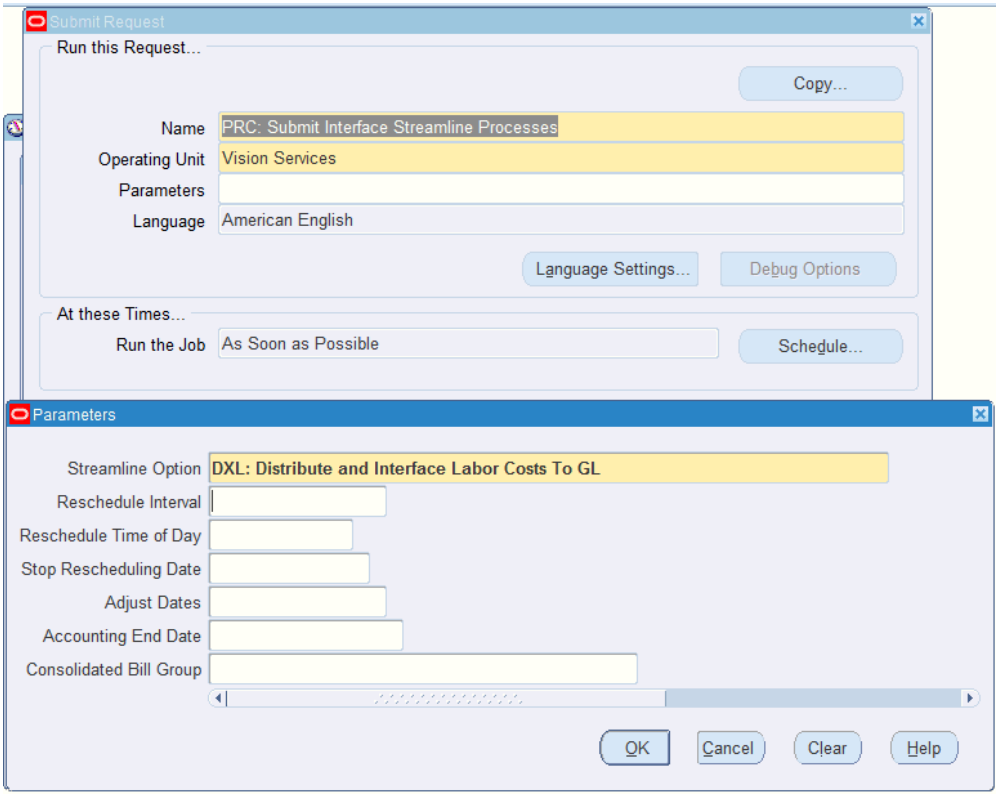


Processing Contingent Worker Timecards in Oracle Projects

The program PRC Submit Interface Streamline Processes combines processes that send information from Oracle Projects to other Oracle Applications. Run this program to process the timecard in Oracle Projects. If you do not perform this step, then you can still view the timecards from the Expenditure Inquiry window. However the timecard is not costed and displays only hours.

To process contingent worker timecards in Oracle Projects:

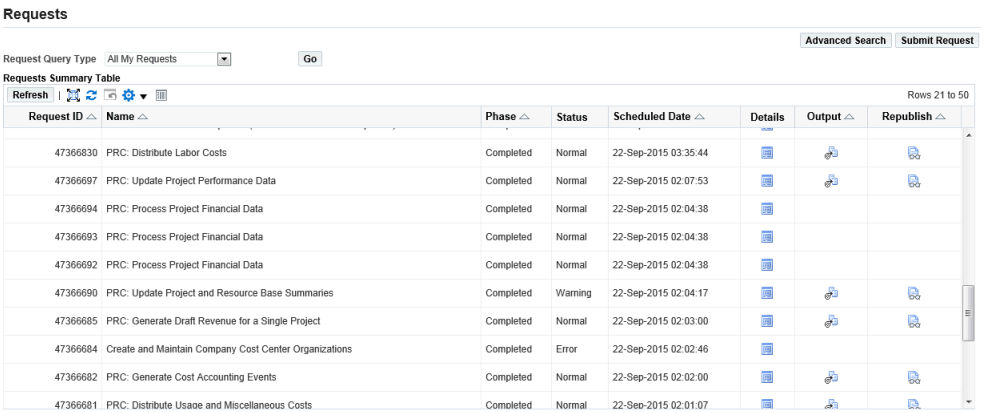
1. Log in to Oracle Projects using the appropriate Projects responsibility.
2. Navigate to the Submit Request window.
3. Select PRC Submit Interface Streamline Processes.



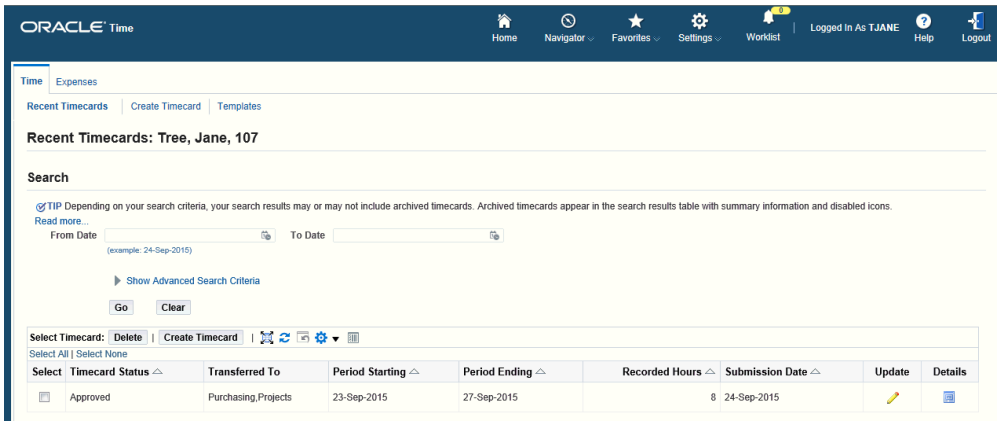
4. Select DXL Distribute and Interface Labor Costs to GL as the streamline option.

5. Submit the program.

6. Monitor the progress of the requests processing. Verify that the processes complete without error. Note the streamline process will "fully process" (cost, account, and interface) the timecard. However you may choose to run "PRC Distribute Labor Costs" only if you do not need the costs accounted and interfaced to GL.



7. After all the processes are successfully completed, when contingent workers log in to self-service, they can view the status of the timecard as Transferred to Purchasing and Projects.

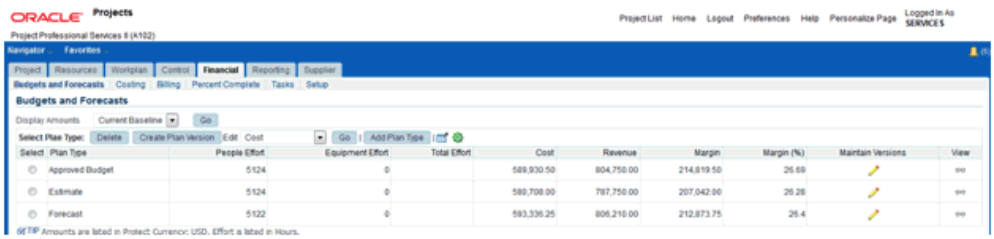


Reviewing the Contingent Worker Labor Costs

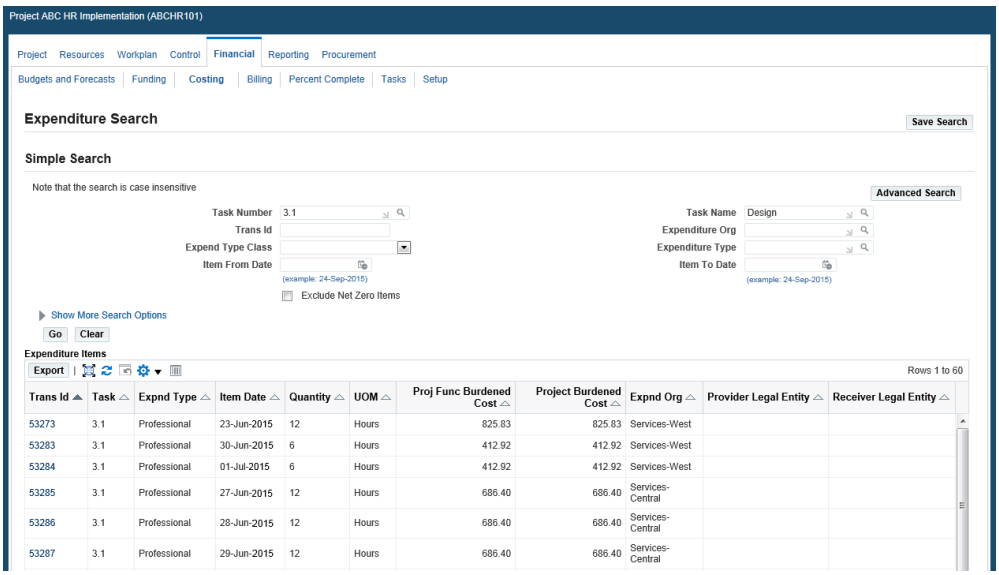
Project managers can review the contingent worker labor costs using Oracle Projects.

To review contingent worker labor costs and check expenditures:

1. Navigate to the Search Projects page (Projects Delivery > Project List).
2. Select a project.
3. Click the Financial tab.
4. Click the Costing subtab.



5. Enter the expenditure search criteria for your project, for example, the task number and view the costing details.



Project managers can view the contingent worker cost details using the following windows in Oracle Projects

- Expenditure Inquiry
- Project Status Inquiry

Spot Buy using Contractor Requests

Using the Contractors tab, click Create Contractor Request. The page that opens prompts you to enter the category of job that you require. Enter a job or a keyword for a job in the field next to the question and click Go. The table below shows you the search results.

The table below the question shows the Job, Category, Job Description, and Limit (USD). Note that the Spot Buy Threshold Limit is displayed only when the ICX Spot Buy Access Role is granted to the logged-in user. The Spot Buy Threshold Limit (USD) can also be rendered using page personalization, depending on your business

requirements.

Select a Job by clicking the relevant option button.

Below the table is a set of three options that pertain to supplier selection. The question

Have you identified the supplier?

requires that you select one of the three options as a response:

- No, I do not know which supplier to use: this response opens the Create Contractor Request page with no supplier related fields. The options for selecting a supplier (Use Preferred Suppliers, Suggest Supplier and Contractor, Use Standardized Job Rates) are displayed, and you can select one of the options to proceed with creating the contractor request. The remainder of the contractor request creation process is the same as the process for creating normal contractor requests. The buyer needs to specify a supplier in Demand Workbench, when the buyer autocreates the spot buy requisition to a purchase order.

- Yes, I already have a particular supplier in mind: this response opens the Create Contractor Request page with the Supplier Information region displayed. The options for selecting a supplier (Use Preferred Suppliers, Suggest Supplier and Contractor, Use Standardized Job Rates) are displayed, and you can select one of the options to proceed with creating the contractor request. The remainder of the contractor request creation process is the same as the process for creating normal contractor requests.

- Yes, I have got pricing from multiple suppliers: The options for selecting a supplier (Use Preferred Suppliers, Suggest Supplier and Contractor, Use Standardized Job Rates) are displayed, and you can select one of the options to proceed with creating the contractor request. This response displays a table in the Create Contractor Request page, where you can add multiple suppliers, rank them and enter the prices they have quoted. First enter the job information, and then scroll down to the suppliers table. Click the Add Rows icon (with the green plus sign) to add a new row for your supplier. Select the supplier name, enter the Price, Promised Date and Rank. The Rank for each supplier should be unique (for example: 1, 2,3…). If you wish to order from the supplier(s), select the Order From checkbox. Click the Update icon to open the Update Supplier popup, in order to enter the contact details for the supplier.

Note that the Target Rate can be in another currency (transaction currency) which can be different from the functional currency. However the Labor Amount column shows you the amount value in the functional currency only.

As the hiring manager, you can view Supplier Information for the job when the requisition is edited. Additionally, the hiring manager can view the supplier details along with ranking and shortlisted suppliers for a contractor request in line currency.

For more information on using Spot Buy Requisitions in the Demand Workbench, please refer to the *Oracle Purchasing User's Guide*.

For more information on setting up Spot Buy, please refer to the *Oracle iProcurement Implementation and Administration Guide.*

Glossary

Advance

A financing payment usually released before any work/service has been performed.

Application for Payment

Term used in the construction industry for 'Payment Request'.

Contract Financing

Contract financing is typically used in Public Sector Contracts. Contract financing is paid based on work performed or cost to date. If the contractually specified performance or cost milestones are met, financing is given to aid in the completion of subsequent work.

Deliverable

A deliverable is the result of a task that is monitored for performance. Contractual deliverables are deliverables that a party is required to perform to fulfill the contract. The buyer enforces contractual deliverables often by making payments (milestone payments, performance based payments) dependent on the fulfillment of a deliverable.

Progress Payment Schedule

Represents a schedule of services and work with associated payments.

Progress Payments

Payments for progress made on a Progress Payment Schedule.

Pay Item

A pay item is a single item in the Schedule of Values which is allocated a value for a specific part of the work, which is used as the basis for submitting and reviewing progress payments.

- Lump Sum pay items as the name suggest are based on a 'Lump Sum' amount allocated to a portion of work. Progress payments can be released for these pay items based on the level of completion.

- Rate pay items are based on a 'Rate' of work completion. Payments for these can be claimed as units of work are completed.

- Milestone pay items are based on a milestone in the contract or event that needs to be fully complete before the associated payment can be claimed by the contractor.

Payment Request

A payment request is a document send by the supplier to request for payment of financing payments, progress payment or retainage. This document is similar to a draft invoice, before the performance is certified. Certification is similar to confirming the receipt of the work. For taxation purposes this may not be considered an invoice (UK).

Progress Payment Rate

Used on Cost Reimbursement Contract. Represents the rate at which costs incurred by the Contractor are reimbursed.

Recoupment

Liquidation of previous financing payments from payments made for the delivery of services.

Recoupment Rate

Rate applied to Invoices which determines the fraction of the Invoice amount used towards recoupment of previous financing payments.

Retainage

A sum of money or percentage of money held back from supplier invoice payments pending completion of outstanding work.

Scope of Work / Statement of Work (SOW)

An SOW is a document created by the requestor outlining the work that needs to be procured. Oracle Projects currently does not have a business object to represent a SOW. The Line structure of the PO / Contract are related to the SOW. The SOW defines the requirements as a free text document, while the contract line structure (and hierarchy) describe the requirements in form suitable for monitoring progress and releasing payments.

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